Training Guide
<u>Repairers</u>

GT Global: Claims Management Platform

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GT Global

Access

Access and **Logging-in**

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.

Technical **Support**

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

Monday to Friday from 8 a.m. to 5 p.m. and Saturdays from 8 a.m. to 12:30 p.m.
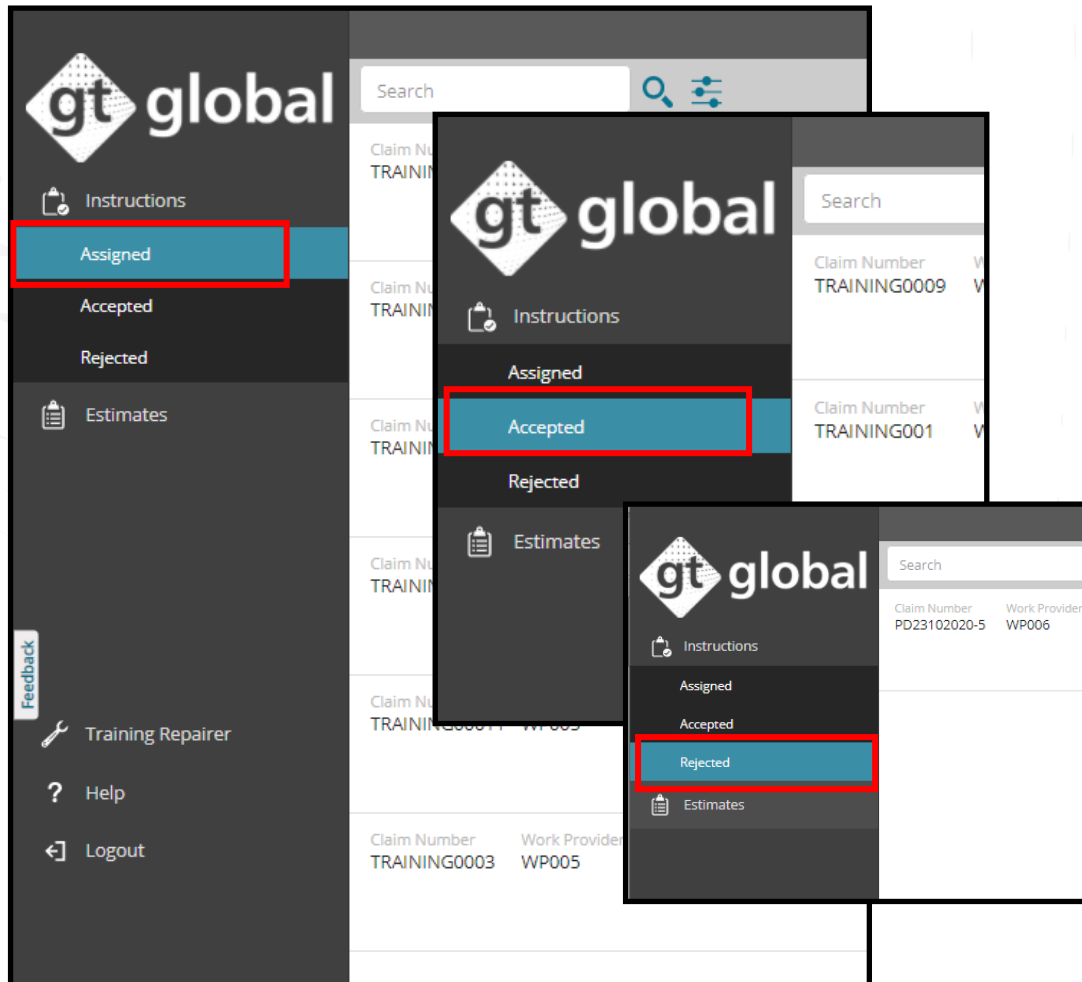
Other Support Resources are available in: https://gtmotive-support.co.uk/

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The Home Page

General **Overview – Instructions Grid**

When you access GT GLOBAL, the "Instructions Grid" will open, where you'll see all the "Instructions" that have been assigned to you. As each Instruction progresses, it will be transferred to a different area or subsection:

The Instructions Grid contains the following subsections:

Assigned: New Instructions that have been assigned to you.

**Accepted:** Those Instructions that you have accepted.

Rejected: Instructions that for whatever reason you have decided to reject.

General **Overview – Estimates Grid (Part 1)**

When you access the "Estimates Grid", you will be able to see all your "Estimates" (Jobs) that you are currently working on.

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:
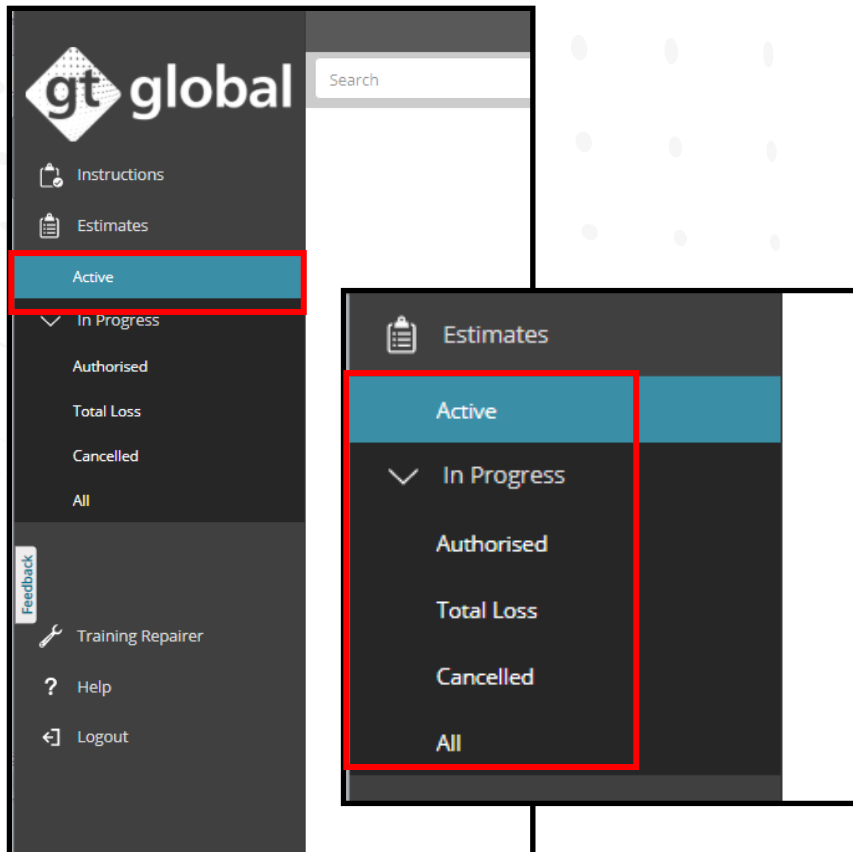
Active: All those jobs that you have accepted, but have not yet started working on.

**In Progress:** Those jobs that you have started working with.

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 your ongoing jobs regardless of their status.

General **Overview – Estimates Grid (Part 2)**

In the **"In Progress"** section of the **"Estimates Grid"**, you will find the following sub-sections:
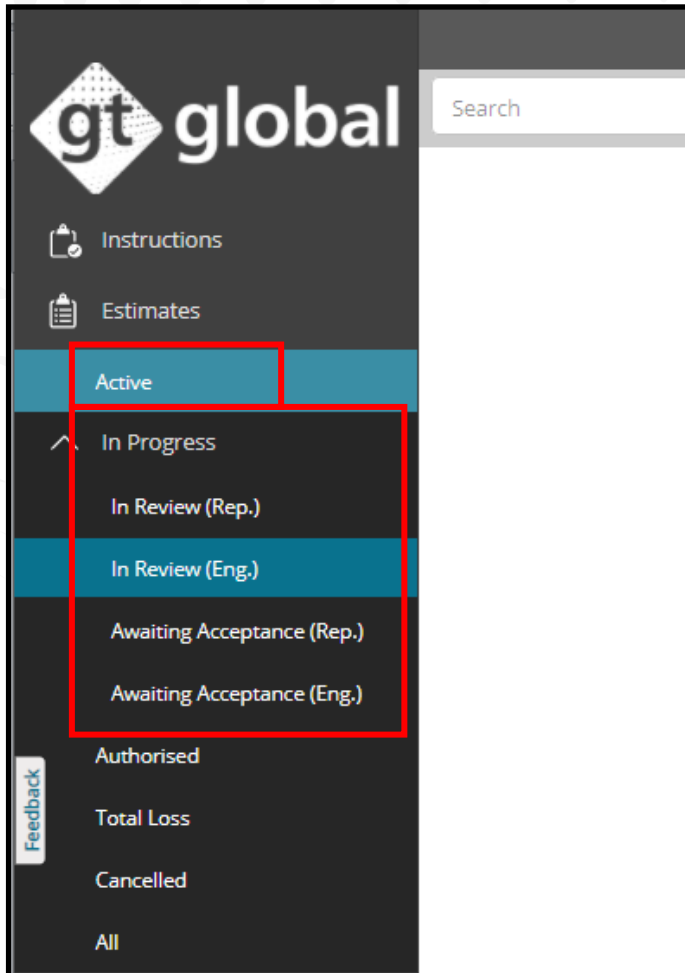
In Review (Repairer): Those jobs that the Repairer is currently working on (At this point the Engineer will not be able to work on the Job).

In Review (Engineer): Those jobs that the Engineer is currently working on. You have sent the Job to the Engineer and 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 you by the Engineer. The Job is in waiting for you to accept or modify.

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

Search and **Sort Function**

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:

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**

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":
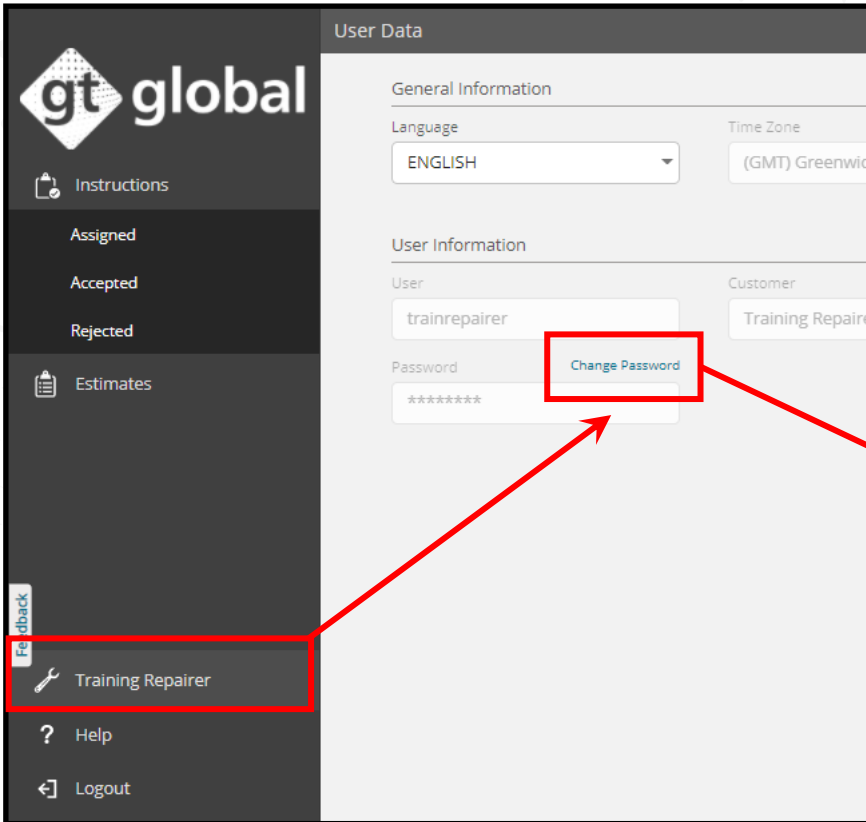
Click on the **Filters** icon to open and close the filters management area..

Change **Password**

If you wish to change your password, go to your **User Information** area of the Home Page and click on **"Change Password"**:

A pop-up window will appear where you'll be required to introduce your **current password**, your **new password** and **confirm**:

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The Instruction Phase

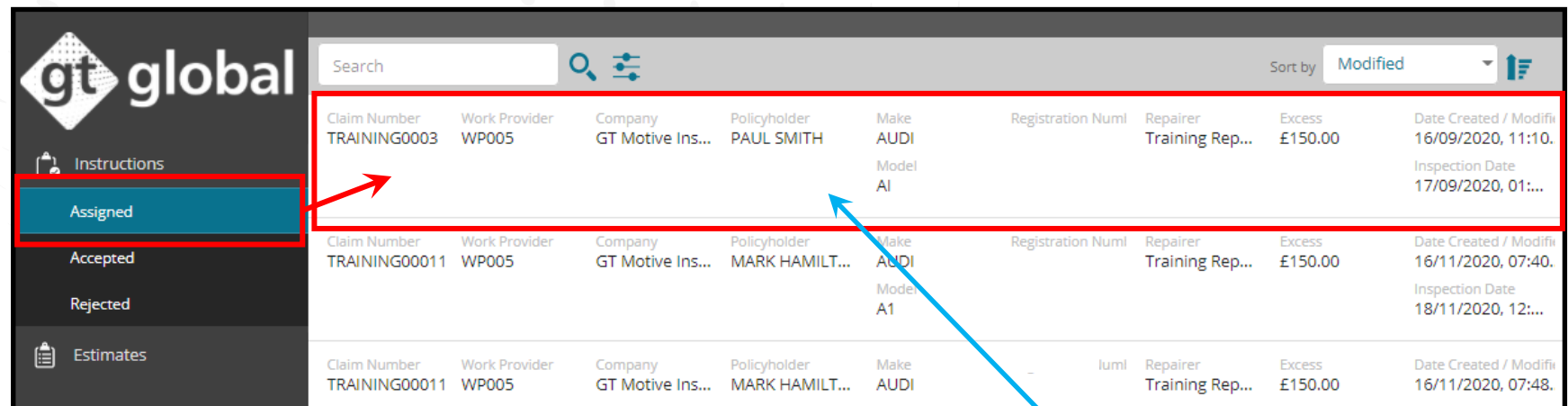# A New Instruction **has been Assigned to you**

The "Instruction Phase" is the initial phase when a new job that has been assigned to you by the Work Provider.

All new jobs that will be assigned to you can be seen in the Assigned area of the Instructions Grid.

Each new Instruction is represented on a line with information regarding the Claim Number, Work Provider, Company, Policyholder, Make & Model of the vehicle, Registration Number, Repairer, the Excess and the Creation Date and Vehicle Inspection Date:

Double click on the Instruction line to open the Instruction.

Reviewing **the Instruction Information (Part 1)**

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

At this stage **you have to determine whether you will accept or reject the Job**. In order to make this decision you should open the various cards regarding the Insured/Policyholder, the Vehicle and the Claim to obtain all the necessary information:

The Insured/Policyholder Info Card.

The Vehicle Info Card.

The Claim Info Card.

Reviewing **the Instruction Information (Part 2)**

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.

Horizontal displacement bar.

Insured/ Policyholder Info

Vehicle Info

Claim Info

Accept or Reject **the Instruction**

Once you have reviewed all the information regarding the Job, click on "Accept" or "Reject" accordingly.

Depending on whether you've accepted or rejected the Instruction, it will move to the "Accepted" or "Rejected" sections of the Instructions Grid.

You have now completed the Instruction Phase and can now commence with the "Estimate Phase".

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The Estimate Phase

Active **Estimates**

Once you have 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:

Double click on the Instruction line to open the Instruction.

General Overview of **the Claim Summary (Part 1)**

Inside each Claim/Job you will find a view based on "Cards" for each of the key areas needed to correctly manage the job.

The Insured / Policyholder Info Card.

The Vehicle Info Card.

The Claim Info Card.

The Estimate Management Card.

The Attachments (Photos) Management Card.

General Overview of **the Claim Summary (Part 2)**

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 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.

Horizontal displacement bar.

Insured/ Policyholder Info

Vehicle Info

Claim Info

Complete the **Claim Information**

Remember that there are certain details within the Claim that must be completed and/or modified as required:

1 – You can establish or modify whether the Insured is VAT Registered:

Go to the Insured/Policy Holder Info Card and establish whether the insured is VAT Registered or not. If the option is marked Yes, establish the "VAT Portion Payable" amount:

2 – You must establish the Mileage of the Vehicle:

Go to the Vehicle Info Card and enter the current Mileage of the vehicle:

3 – You must inform if the vehicle has been collected:

Go to the Vehicle Info Card, and if it has been established that the collection of the vehicle is required, inform when this has been carried out by selecting "Yes":

4 – You must inform if you have provided a Courtesy Car:

Go to the Claim Info Card, and if it has been established that a Courtesy Car is required, inform when it has been provided by selecting "Yes":

Messages

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 work provider/engineer ("Public" Messages), and/or internal messages with other Users within your body-shop ("Private" Messages).

Write a message and click on **Send Message**:

Write an internal message to other Users within your body-shop.

Write a message to the **work provider/engineer**.

Creating the **Estimate**

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:
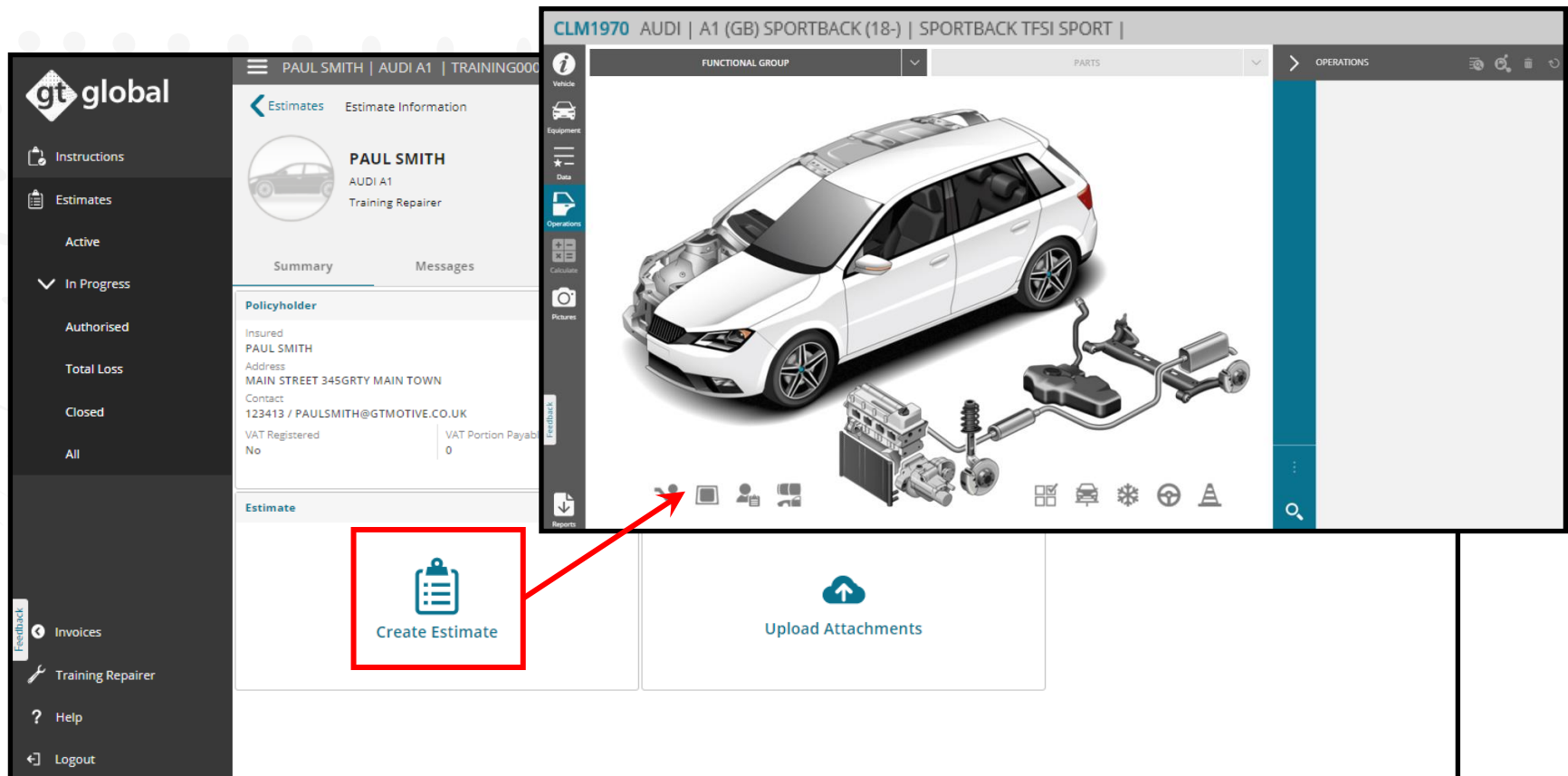
Attaching **Photos (Part 1)**

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

Attaching **Photos (Part 2)**

Once inside the Attachments area, click on **"Upload"** to select the photos from your PC.
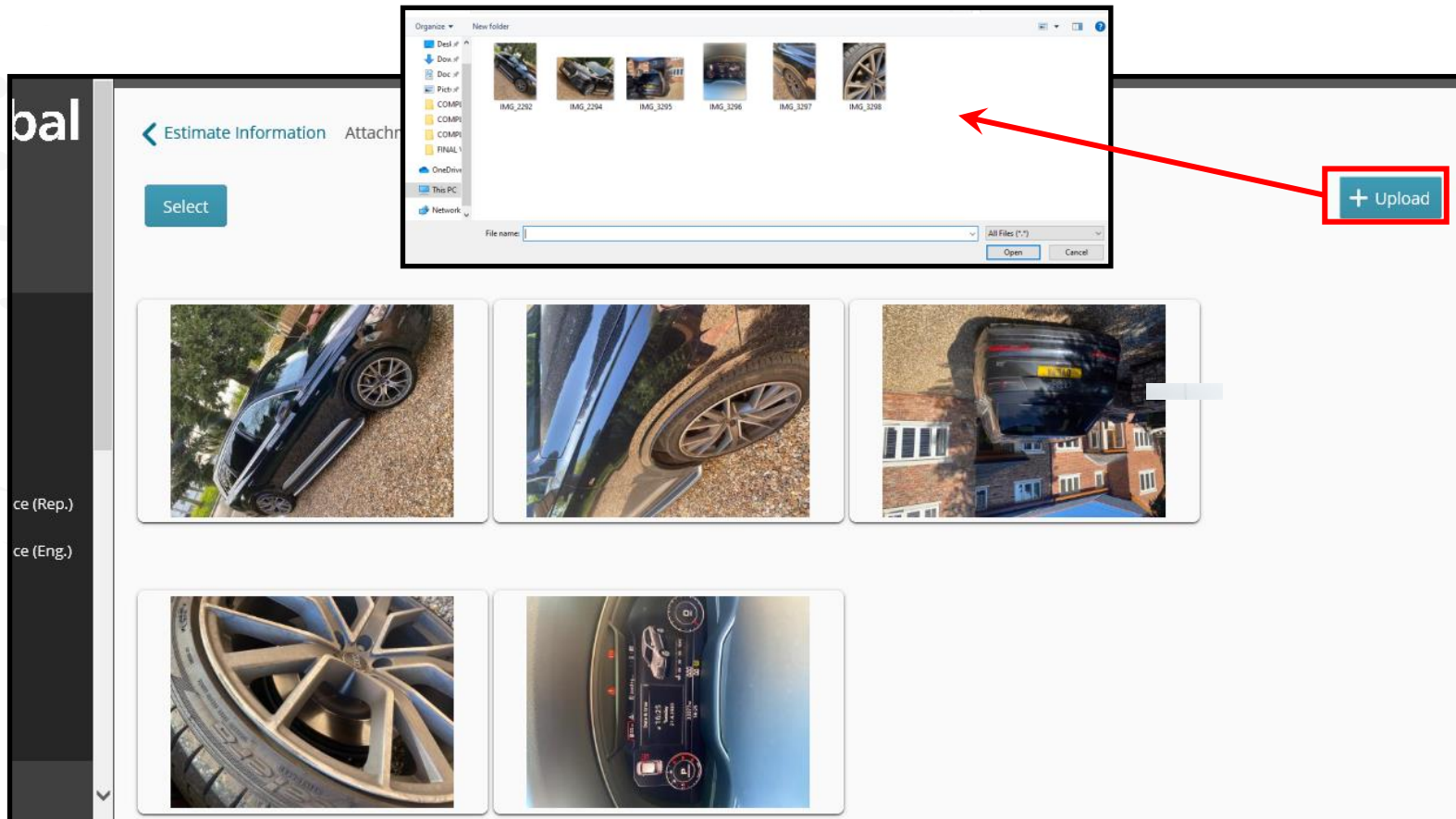
Attaching **Photos (Part 3)**

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

Use these icons to zoom-in and out and rotate.

Write a caption for this photo here.
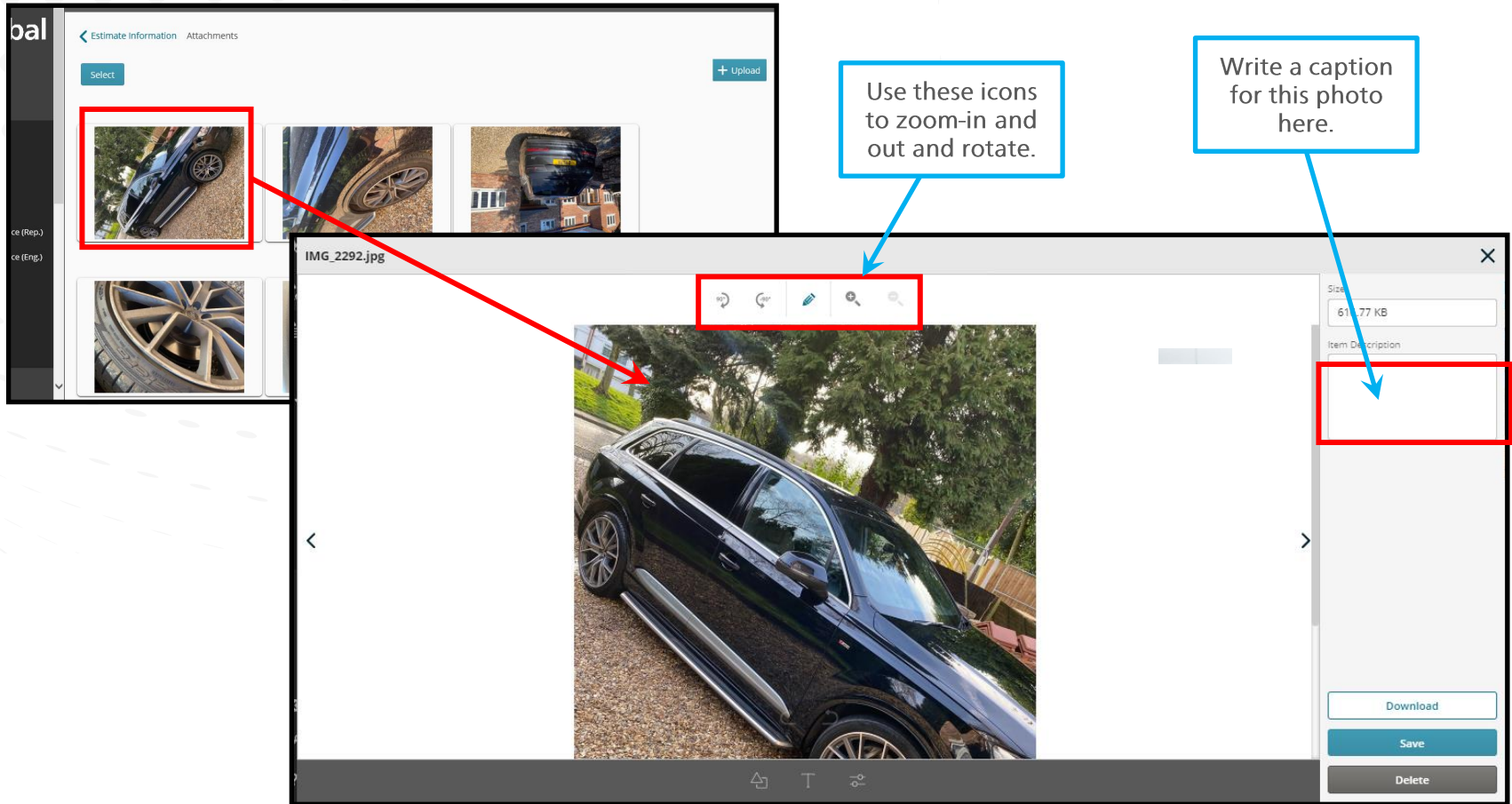
Attaching **Photos (Part 4)**

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...:

Photo Editing Tool Bar.
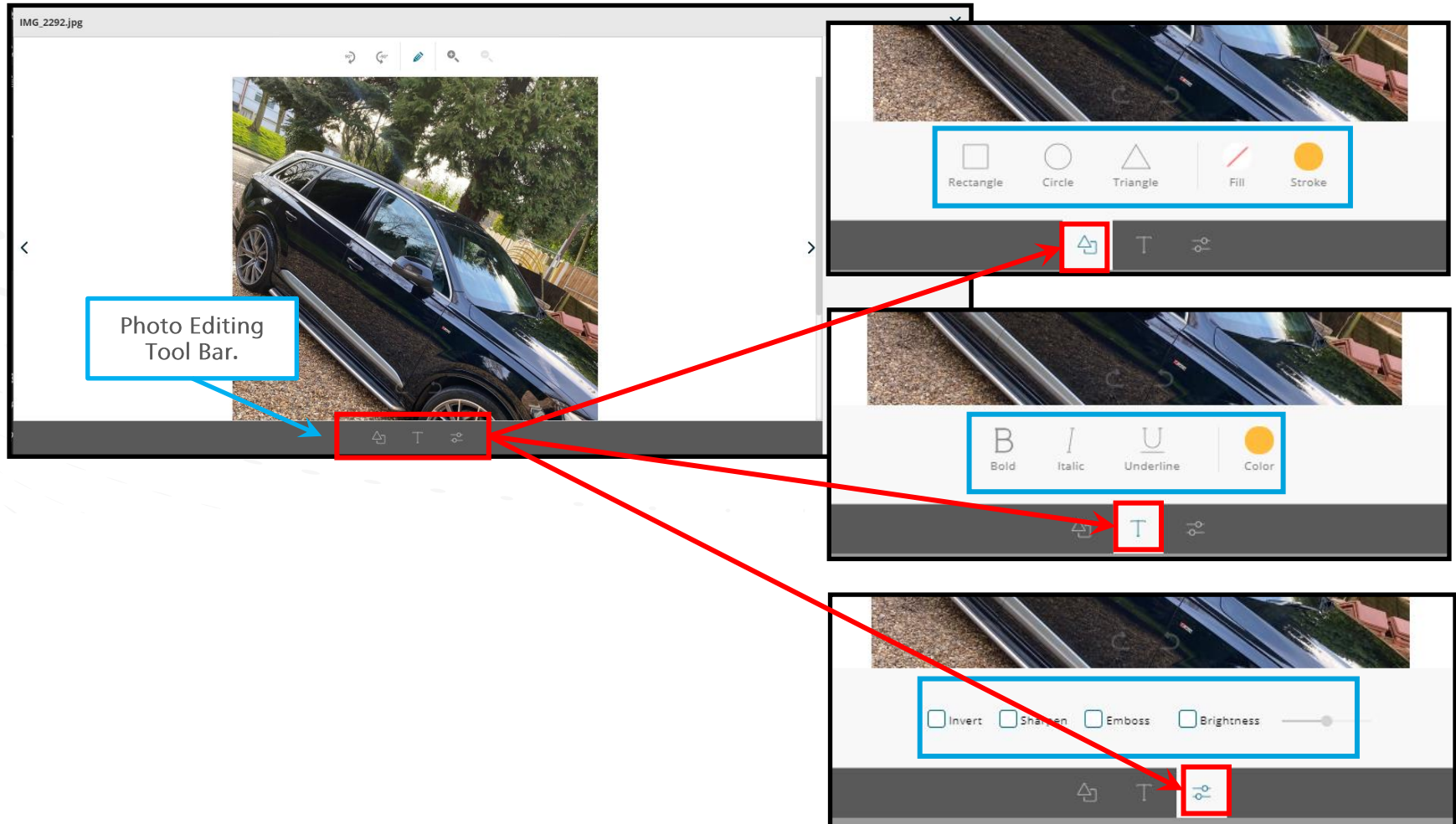
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Creating the estimate in GT Estimate

Identifying the **Vehicle**

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.

Choose your Profile from the drop down menu.

VRN Look-up Function.

VIN Query Function.

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**

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

From here you can review/modify the vehicle equipment.

Work your way down the different stages of the estimate.

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)**

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.

The Estimate **Data Screen (Part 2)**

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

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

Others

Total loss

Yes	**No**	Pending

Economically reparable

Yes	No	Pending

Technically reparable

Yes	No	Pending

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

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The Estimate **Data Screen (Part 3)**

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.
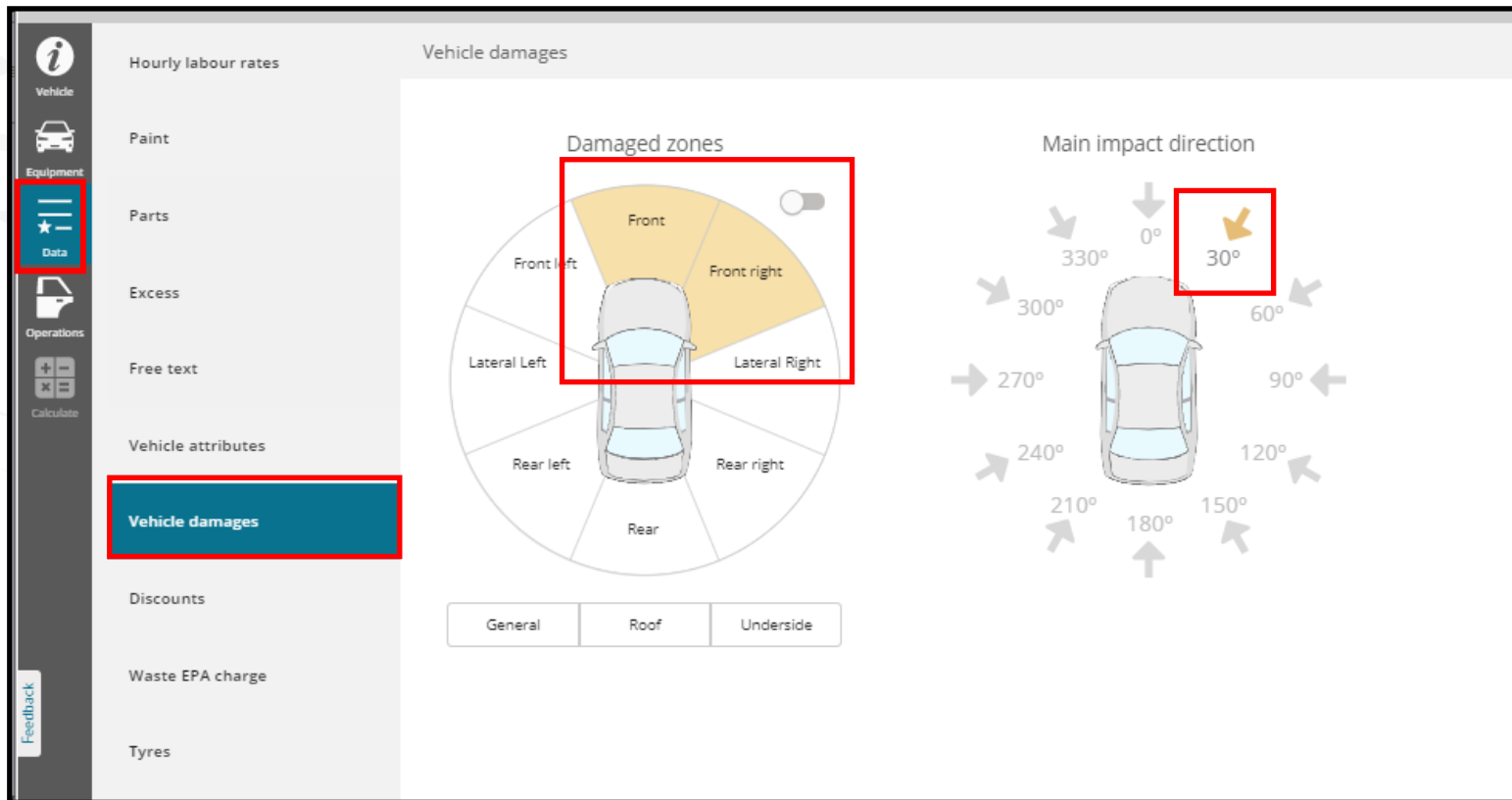
The Operations **Selection Screen (Part 1)**

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:
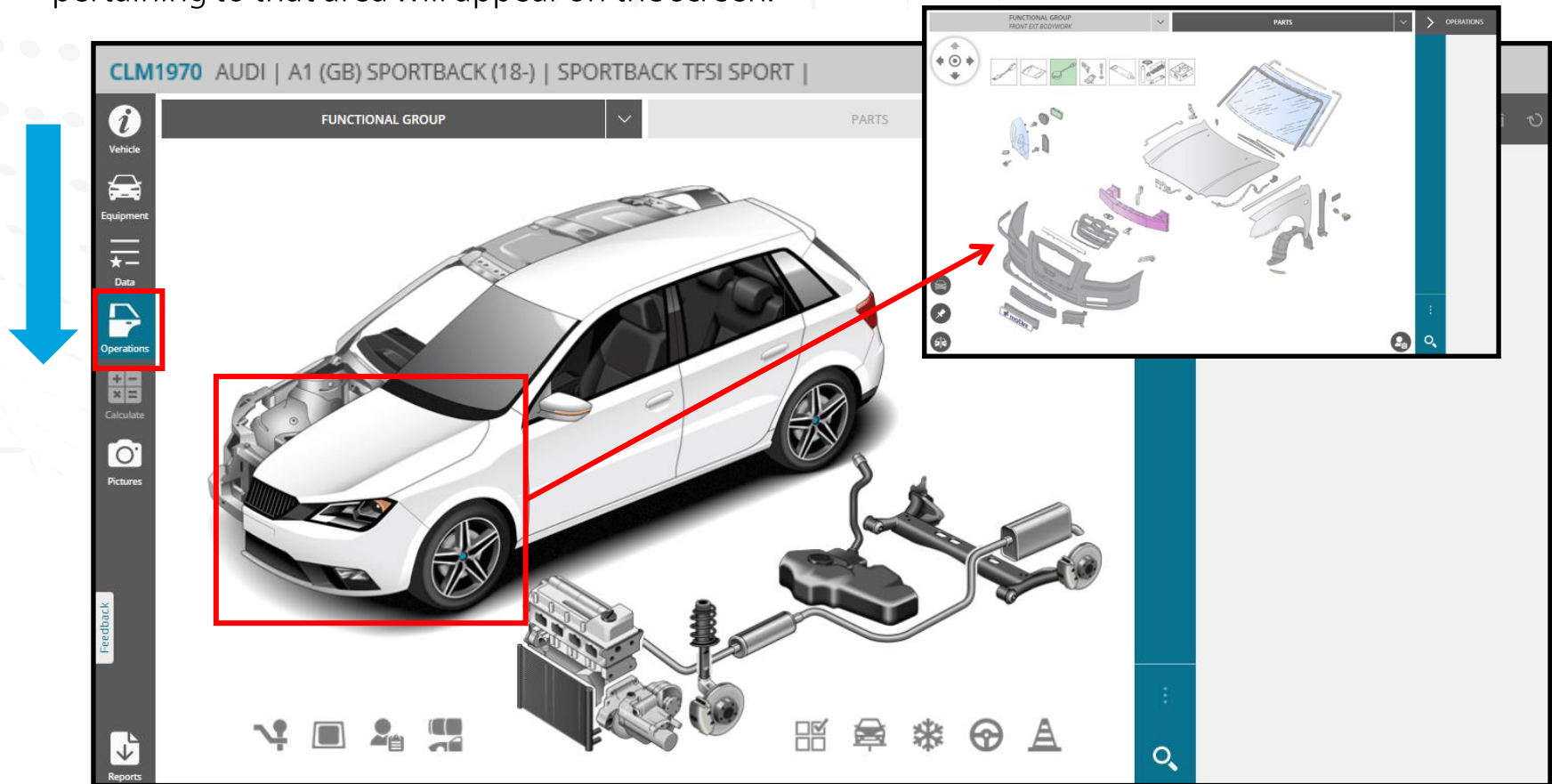
The Operations **Selection Screen (Part 2)**

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

Light Blue: **Glass**

Dark Grey: **Plastic**

Green: **Aluminium**

Violet: **Extra and Ultra High Strength Steel**

Magenta: **High Strength Steel**

Light Grey: **Steel**
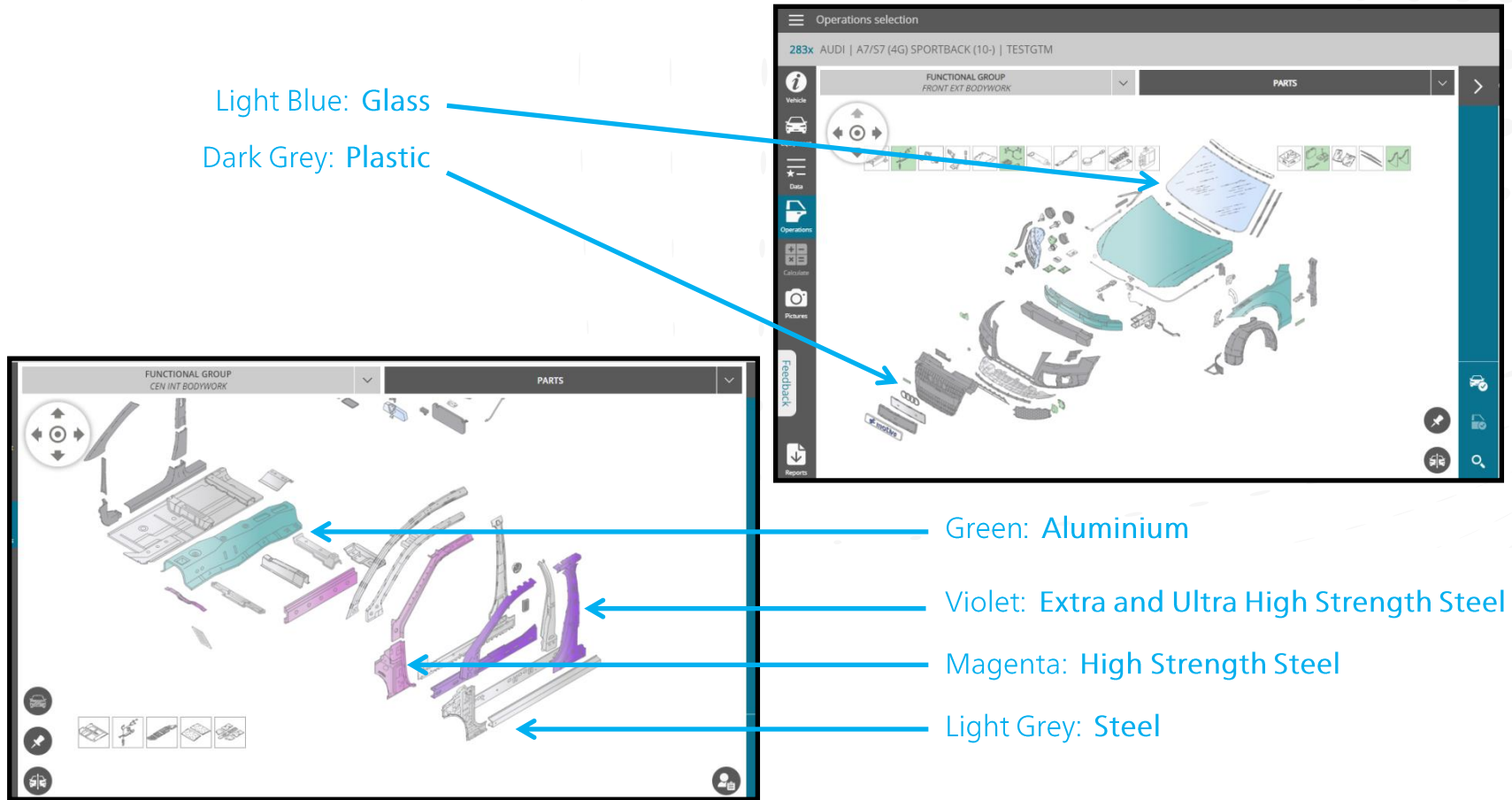
Adding an **Operation**

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 operations and items will be added to the Operations List.

Use this little tab to deploy the task labels on the screen.

Moving Around the **Various Functional Groups**

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:
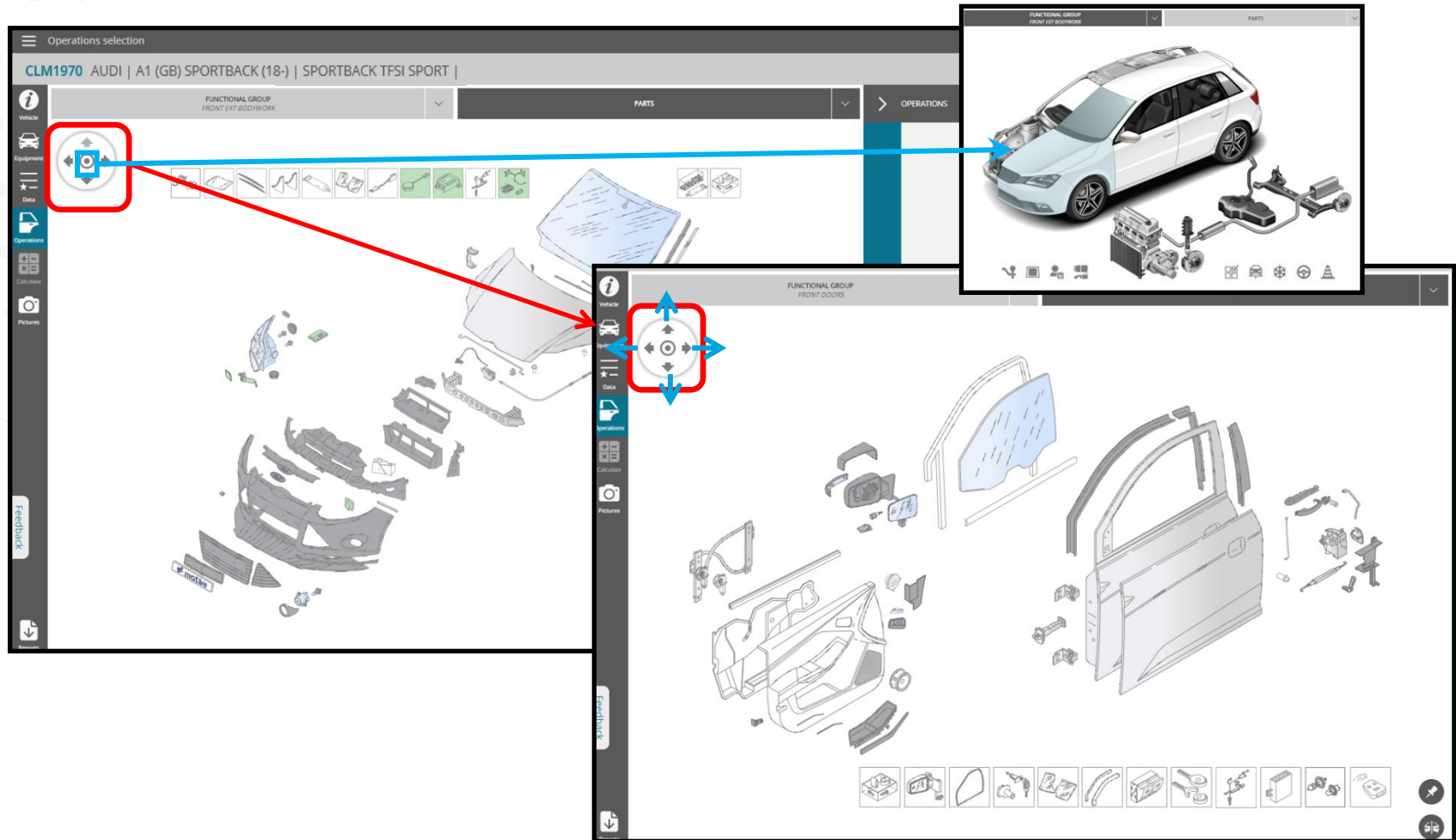
Adding a **Paint Operation (Part 1)**

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:

Adding a **Paint Operation (Part 2)**

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:
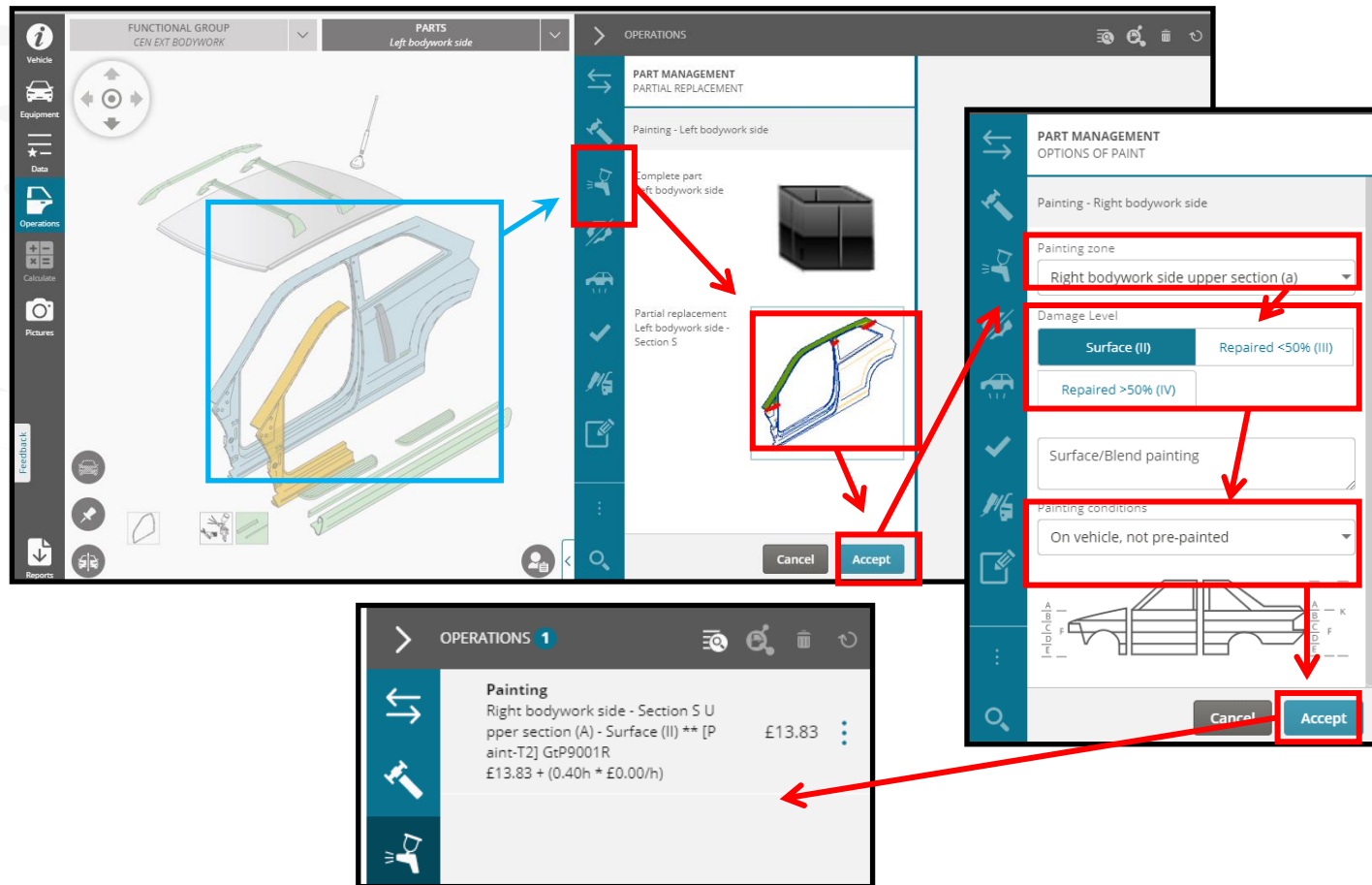
Modifying an **Operation**

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.

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..

User **Operations (Part 1)**

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.

User **Operations (Part 2)**

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"**:

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.

User **Operations (Part 3)**

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.

OPERATIONS

ADD USER OPERATION

Part
DECAL

Code
005

Information
CAR DECALS

Task
Specialist

Total Amount
300

Group

Excluding tax

Save to My Operations

Task
Specialist

Total Amount
-35

Group

Cancel   Accept

# The Active **Group Function**

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":
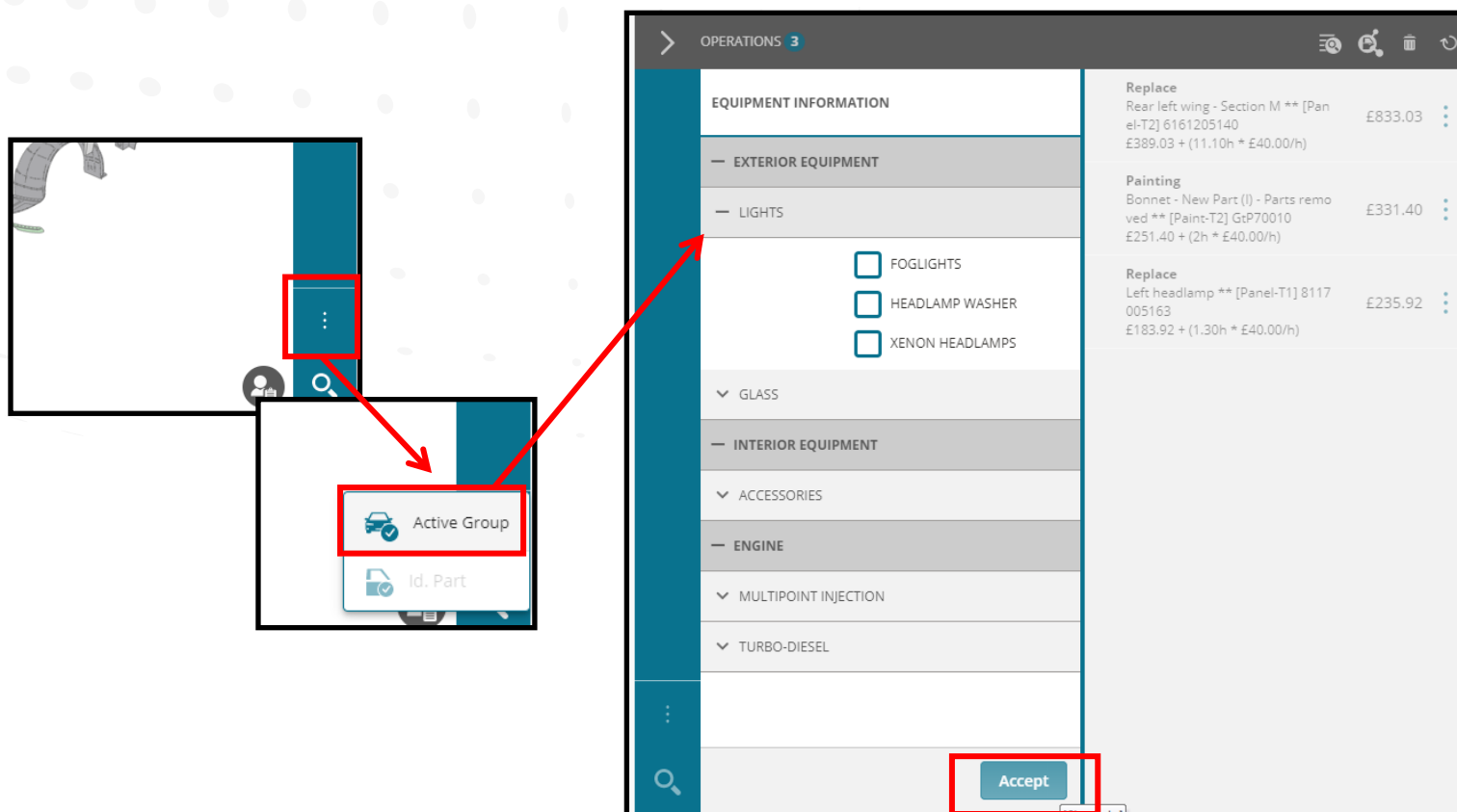
The Parts **Search Function**

GT Estimate also has a Parts Search function where you can search for a part using the <u>name</u> or <u>reference number</u>. 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.


Click here to open the Parts Search Function.

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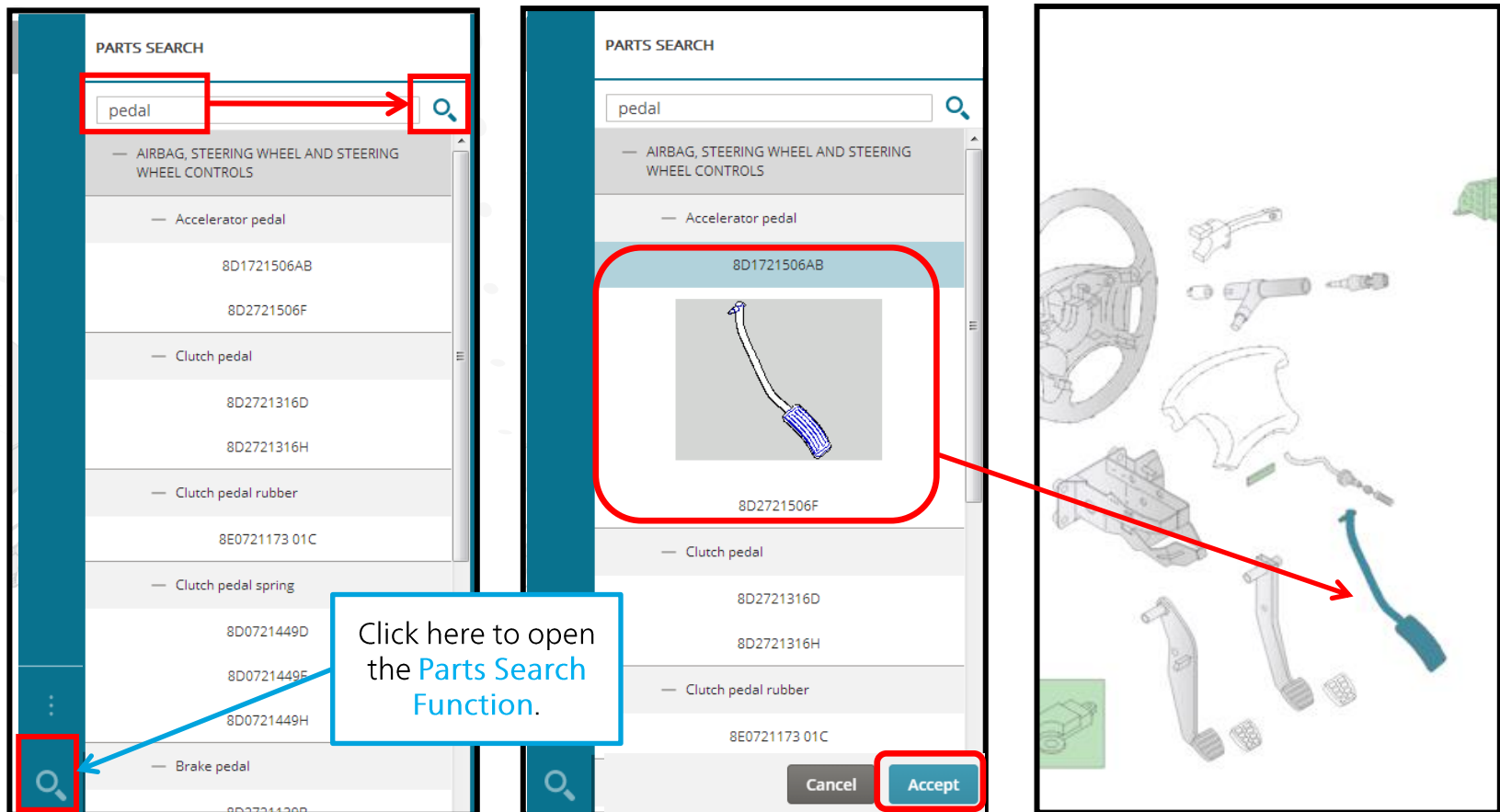
The Laterality and **Task Lock Functions**

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.
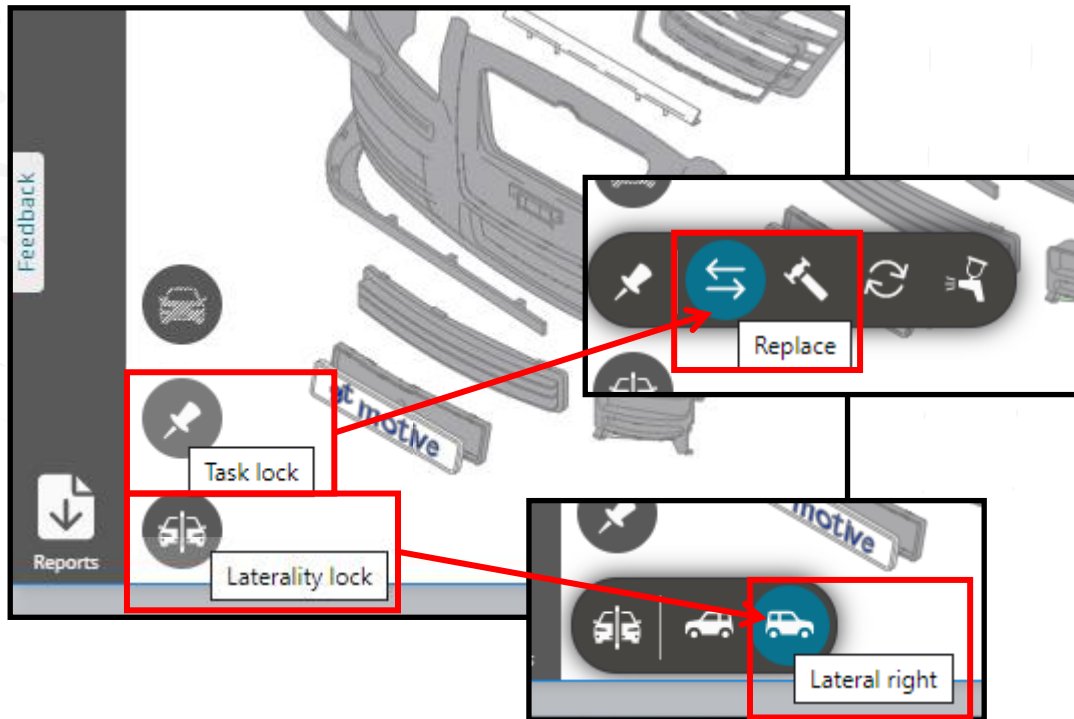
Calculating an Estimate – **The Results Screen (Part 1)**

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.

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".

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

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):

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).

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Creating a Z-Manual Estimate

Creating a **Z-Manual Estimate**

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.

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.

Enter here the real make and model of the vehicle.

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

Using **Manual Paint System (Part 1)**

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.

Enter any fixed amounts for paint, labour, labour time and paint materials here.

Using **Manual Paint System (Part 2)**

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:
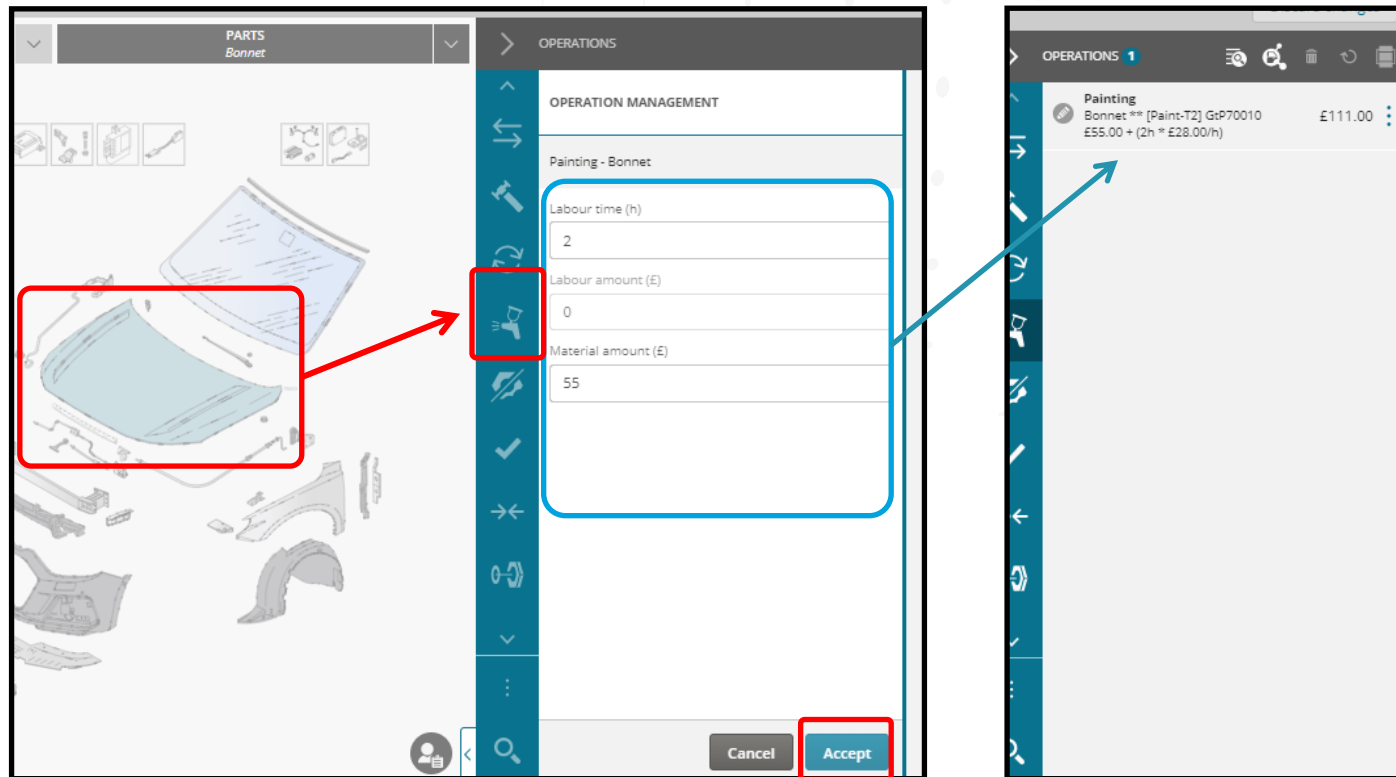
Adding a **Part in a Z-Manual Estimate**

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:
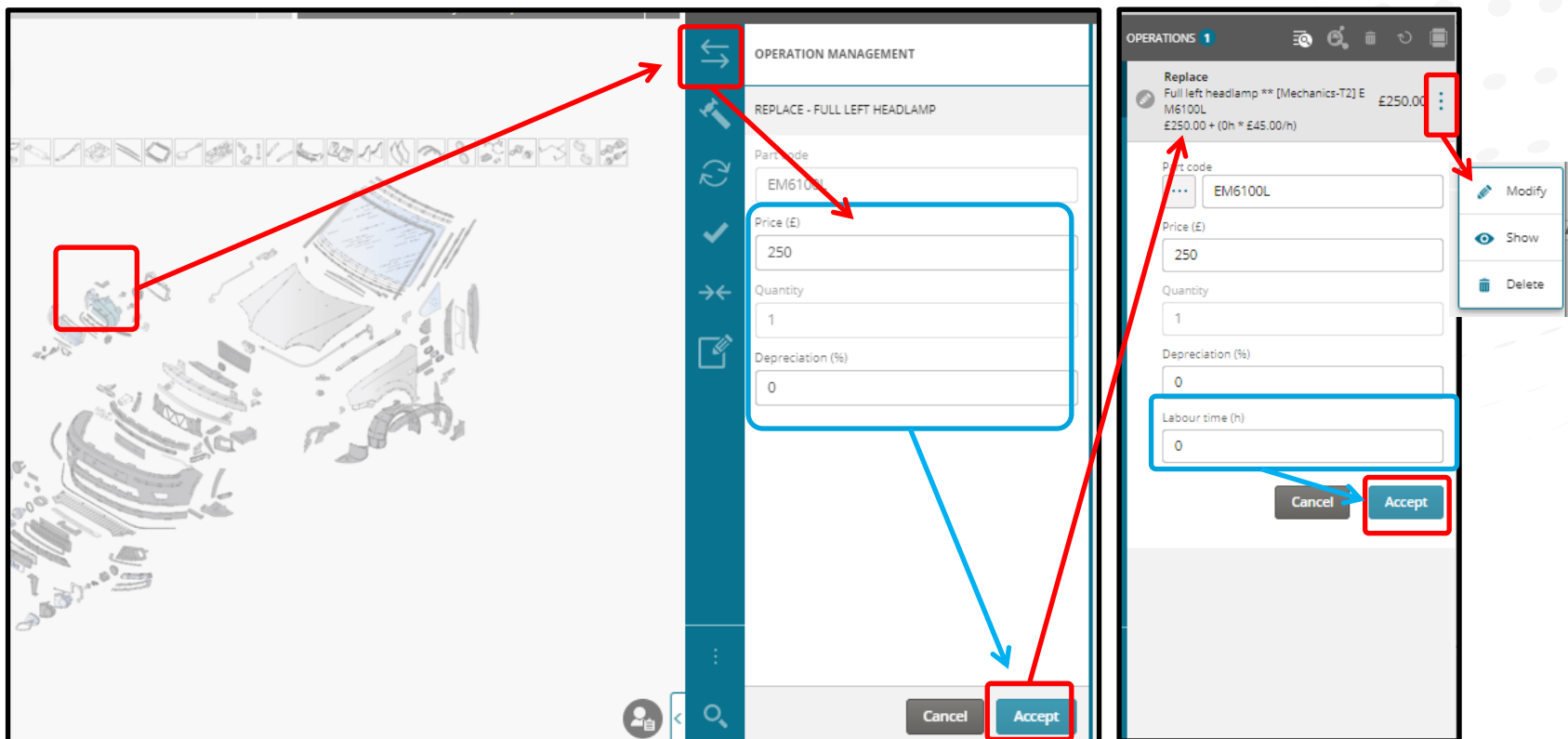
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Sending the Estimate to GT GLOBAL

Sending the **Estimate to GT Global (Part 1)**

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.

Sending the **Estimate to GT Global (Part 2)**

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.

A Closer Look at the **Estimate Management Card**

Let's have a closer look at the information contained in the Estimate Management Card:

Estimate v.0.1

£1,552.42

Estimator
Training Repairer

Eng. Company
GT Motive Insurance

Managed By
Training Engineer

Modify

Rules Warning

0

Status
14/07/2021 03:46 PM

● In Review (Rep.)

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 you've established in the "Vehicle Attributes" area of GT Estimate. See section "The Estimate Data Screen".

Final Indicator will display "Yes" or "No" depending on whether you've declared the Estimate "Open" or "Closed". See section "Calculating the Estimate / The Results Screen".

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Audit Rules

Audit **Rules (Part 1)**

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	"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.

> * The result of the Audit Rules <u>do NOT</u> mean that the estimate is approved or not-approved. Even if a "Warning" message is obtained, <u>you can still send the estimate to the Work Provider as shown for it to be addressed/reviewed by an Engineer</u>.

Audit **Rules (Part 2)**

If a **"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 **Warning** icon of the Estimate Management Card:

At this stage you can opt to **Modify** the estimate to make it comply with the Audit Rules or **Send** the Estimate anyway for it to be addressed/reviewed by an Engineer (See section "Sending the Estimate to the Work Provider").

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Sending the Estimate to the Work Provider

Sending the Estimate to the **Work Provider**

To send the estimate and attachments to the Work Provider, click on the **"Send"** icon situated above to the right:
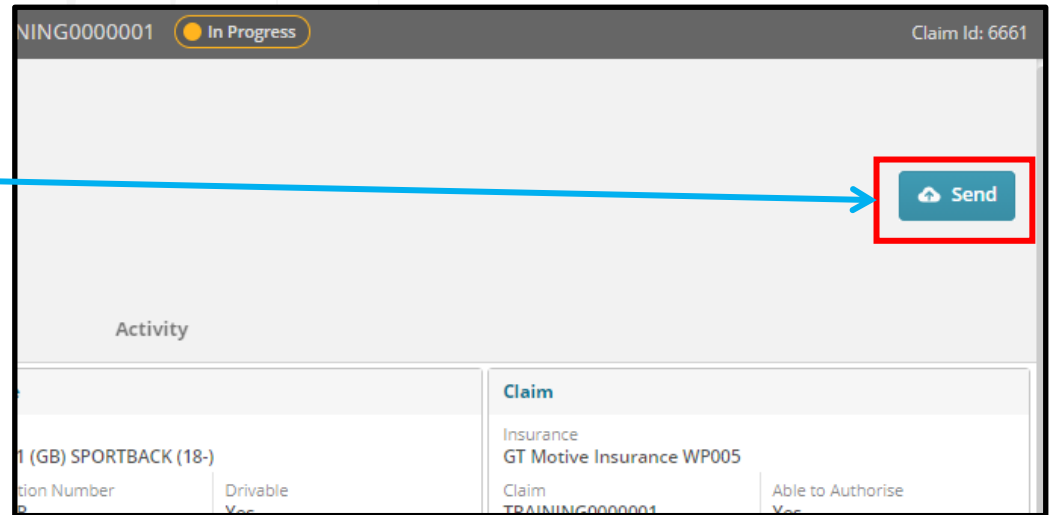
Once you've sent the estimate to the Work Provider, and depending on whether it's approved immediately or not, the Job can adopt an "Awaiting Acceptance (Eng)" status, and the Job will be transferred to the "Awaiting Acceptance (Eng.)" area of the Estimates Grid:
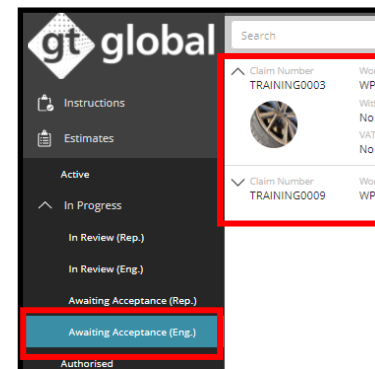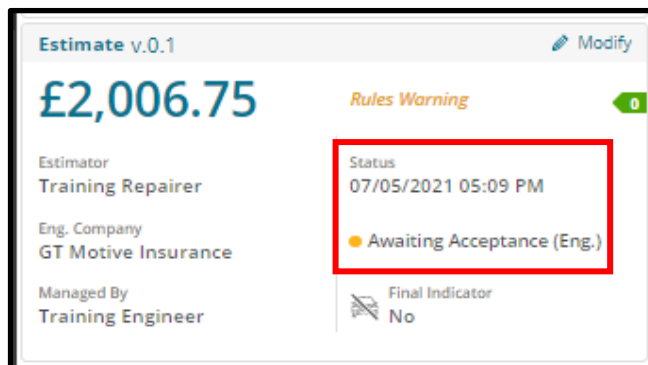
Validation **Rules**

When you send the Job/Estimate to the Work Provider, the Job/Estimate is run through what's called the Validation Rules, which will check for any administrative Information that might be incomplete.

In the below example the Job is lacking the minimum number of required photos:
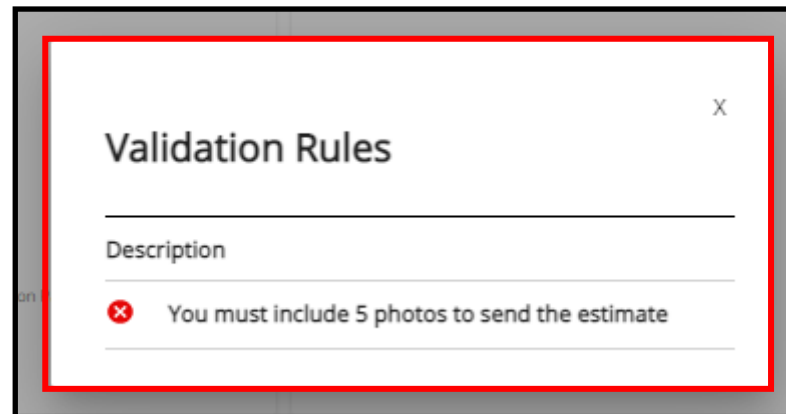
To be able to send the Job/Estimate to the Work Provider, you must complete/amend the administrative information specified in the message.

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The Estimate has been Reviewed by the Engineer

The Estimate has been **Reviewed by the Engineer (1)**

Once the Engineer has reviewed the Estimate, there are various scenarios that can occur:

SCENARIO 1: MODIFY AND SHARE.

The Engineer may decide to make changes and share those changes for you to accept.

If this occurs, the Job will be transferred to the **"Awaiting Acceptance (Rep.)"** area of the Estimates Grid.
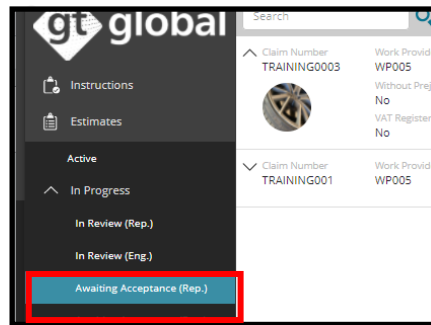
If you go to the Estimate Management Card you will see the new status of the estimate, and you will be able to **Accept** or **Modify** accordingly. The Engineer may have left a message for you when sharing his modifications, in which case you'll be able to read it in the messages tab:
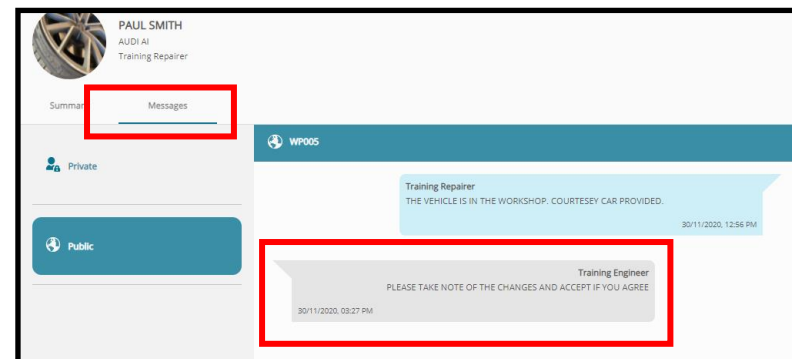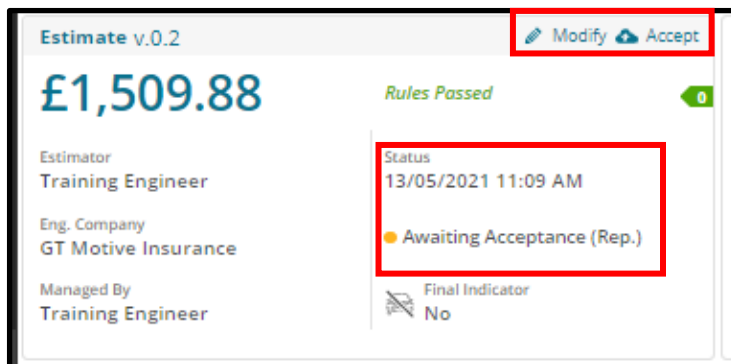
The Estimate has been **Reviewed by the Engineer (2)**

<u>SCENARIO 2: MANUALLY APPROVED (WITH OR WITHOUT MODIFICATIONS).</u>

The Engineer on the other hand, can also make changes (Or Not) and **"Manually Approve"** the Estimate, in which case the Job will be transferred to the **"Authorised"** area of the Estimates Grid:
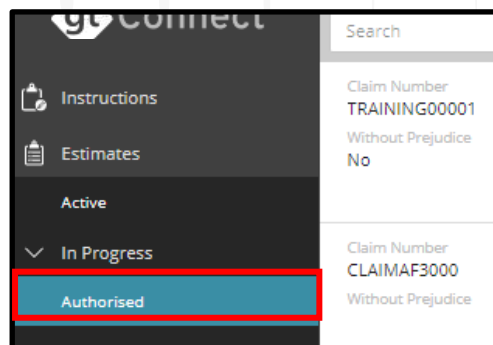
In these cases, the Estimate Management Card will show the new status as **"Authorised"** and <u>you will not be required to accept</u>. You may **"Modify"** the estimate nonetheless, and as before, the Engineer may have left a message for you when authorising the Job, in which case you'll be able to read it in the messages tab:
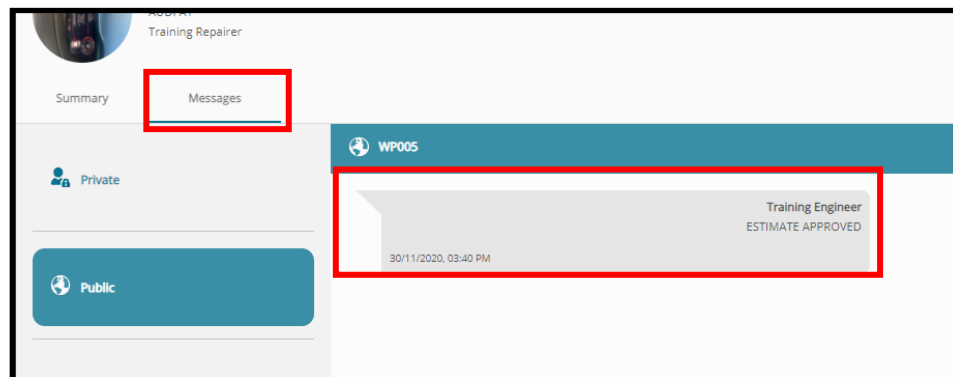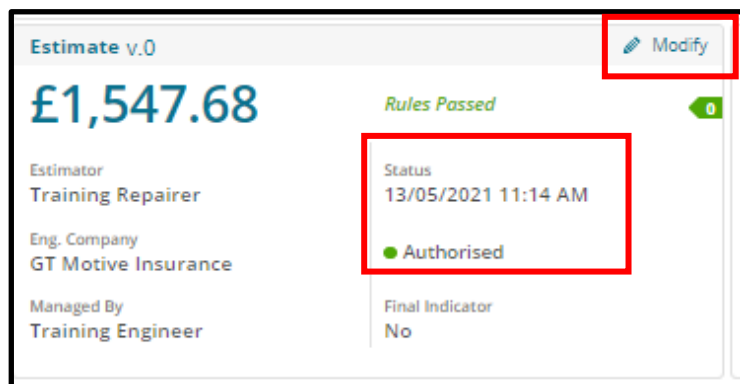
The Estimate has been **Reviewed by the Engineer (3)**

SCENARIO 3: THE ENGINEER ASKS YOU TO RESEND THE ESTIMATE.

The Engineer can also ask you to "Resend" the Estimate. In these cases the Job will be transferred to the "Awaiting Acceptance (Rep.)" area of the Estimates Grid, and will be accompanied by a message from the Engineer with instructions regarding the modifications or amendments you should carry out:
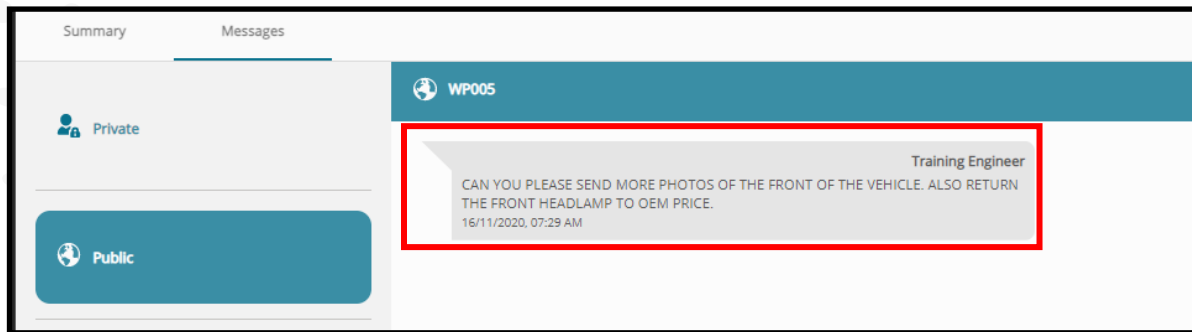
The Estimate Management Card will show the new status as "Awaiting Acceptance (Rep.)" and you should "Modify" the estimate following the Engineer's instructions and Resend the Estimate again for his review:

Modifying the **Estimate (Part 1)**

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)**

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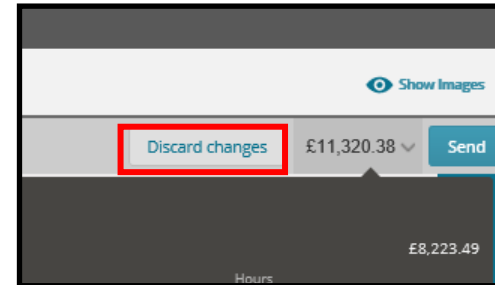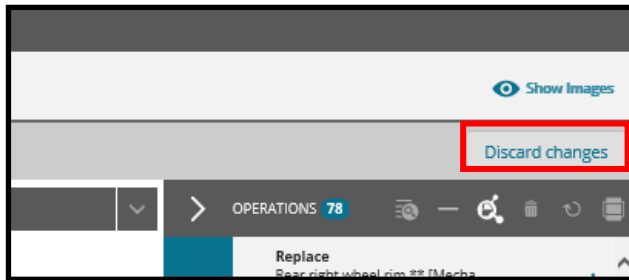
A message will appear for you to confirm that you wish to discard the changes you've made and you'll be led back to the Estimate Management Card and the global view of the Job:
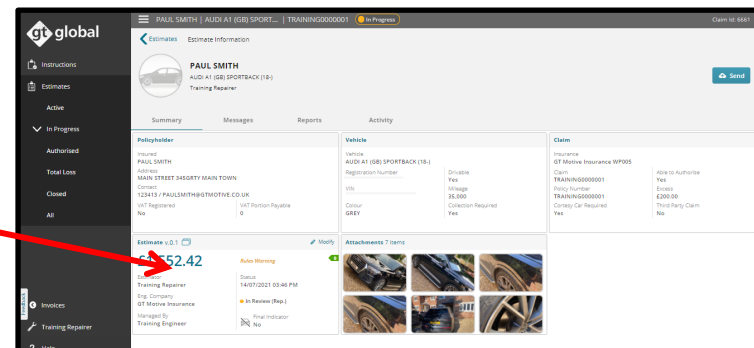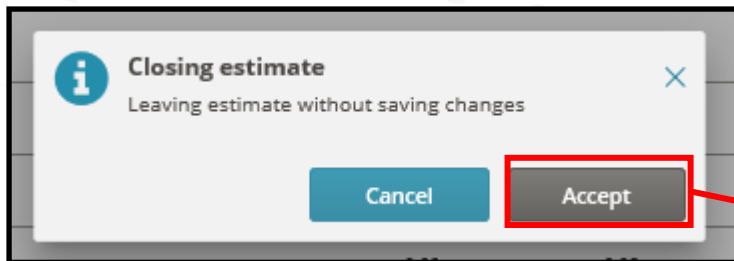
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The Estimate is Approved / The Authority Note

The Estimate is Approved / **The Authority Note**

When a Job is Authorised, as we've explained before, the Job will be transferred to the "Authorised" area of the Estimates Grid:
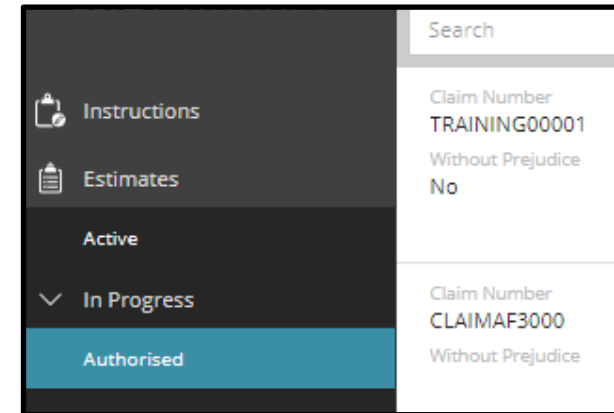
When this happens from the "Reports" Tab you'll be able to download the Authority Note among other necessary documents:
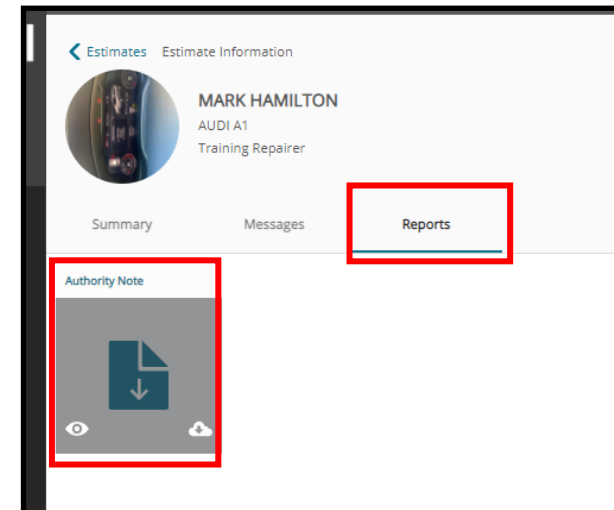
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Jobs that are Declared a Total Loss

Jobs that are **Declares a Total Loss**

If a Job is declared a Total Loss by the Engineer, the Job will be transferred to the Total Loss area of the Estimates Grid, and from within the Assignment you can download the Total Loss Notification from the Reports Tab:
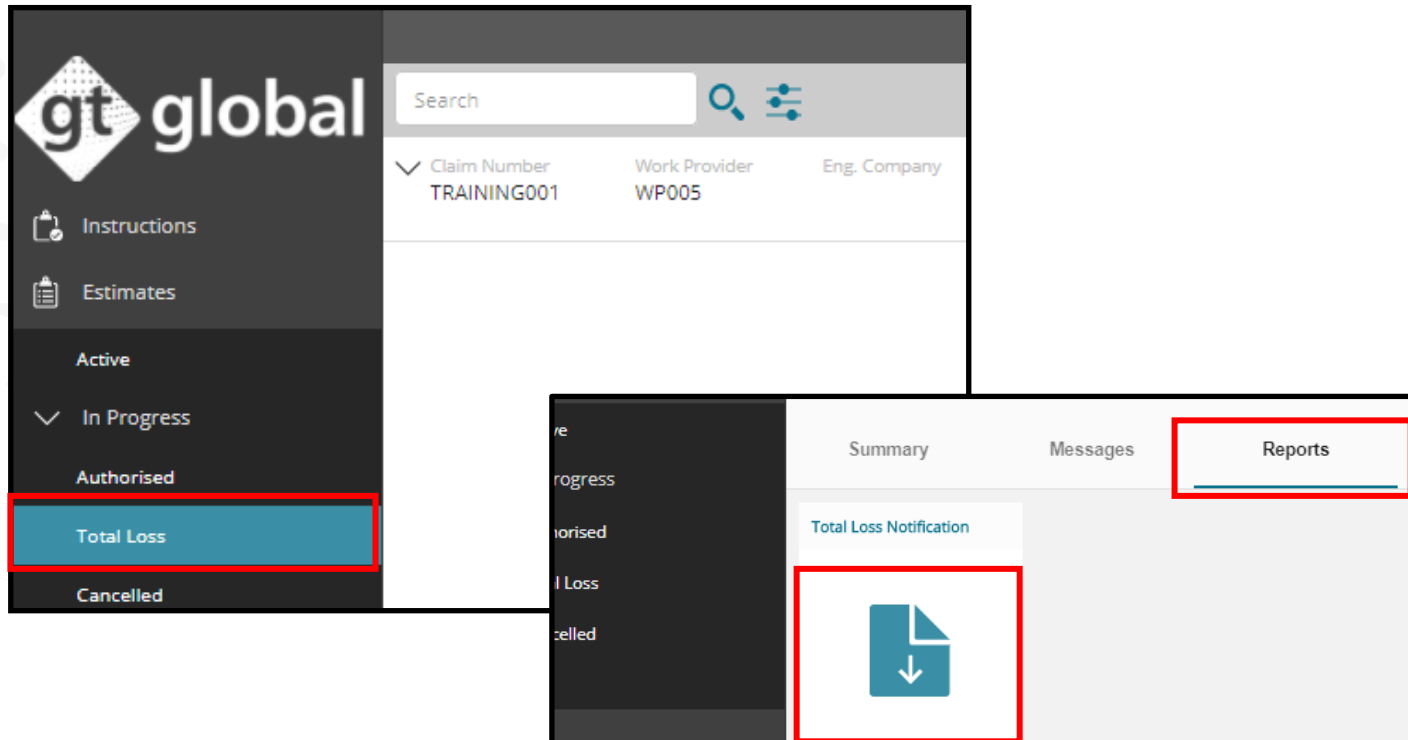
Once this happens, any Inherited Costs or Total Loss Costs will be managed as indicated by each Work Provider.

The Invoicing **Module**

Once a Job is authorised, to invoice it you must first click on the **"Invoice"** icon within the claim above to the right:
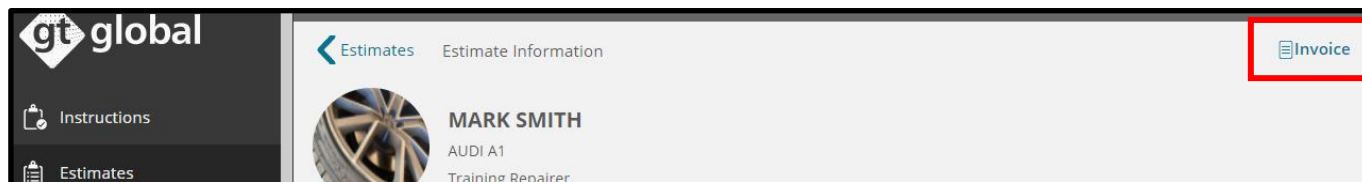
Next go to the **"Invoices"** section where you'll be led to the Invoices Grid with the sections for **"Pending"**, **"Tracking"** and **"Completed"** invoices:
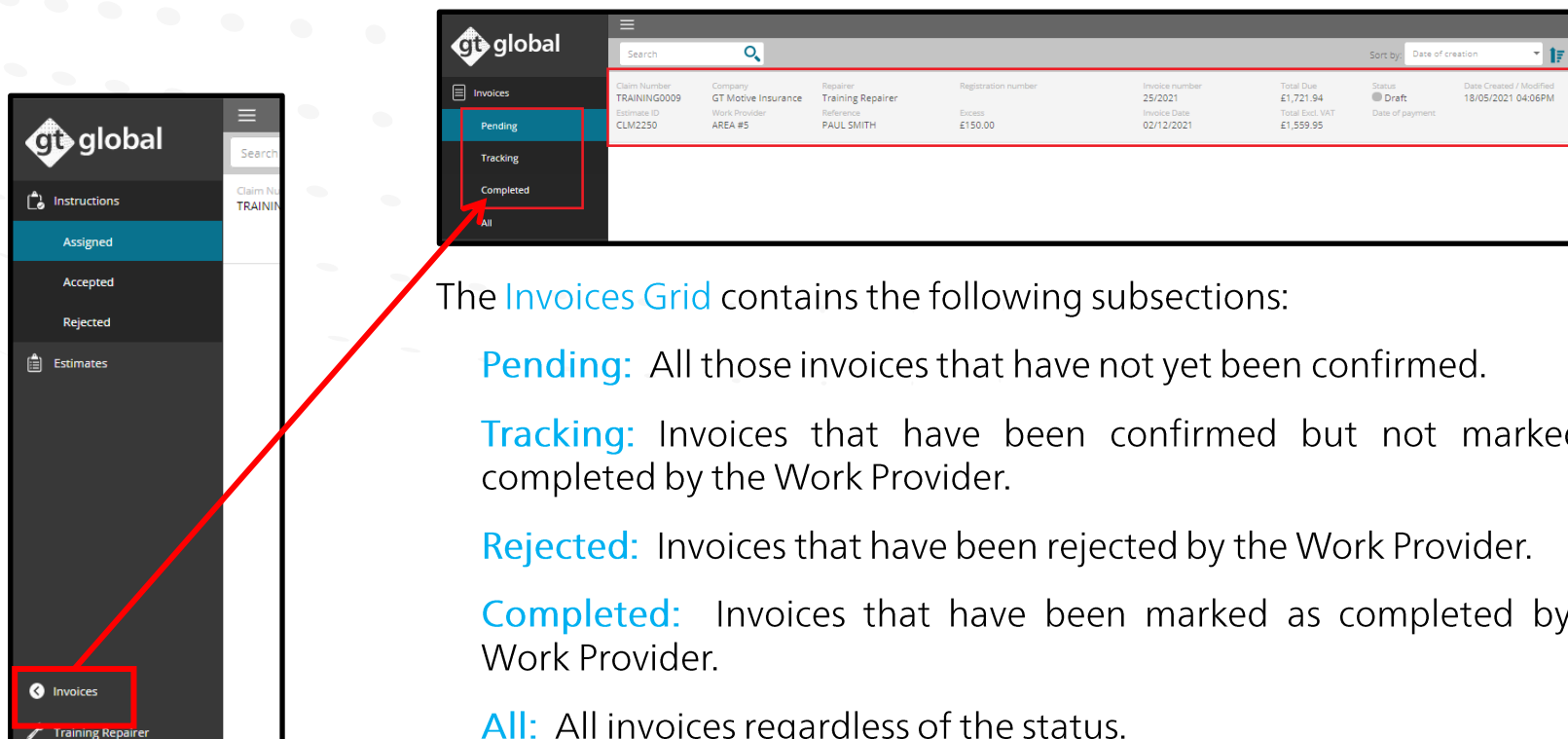
The Invoices Grid contains the following subsections:

Pending: All those invoices that have not yet been confirmed.

Tracking: Invoices that have been confirmed but not marked as completed by the Work Provider.

Rejected: Invoices that have been rejected by the Work Provider.

Completed: Invoices that have been marked as completed by the Work Provider.

All: All invoices regardless of the status.

Confirming the **Invoice (Part 1)**

Click on the invoice you wish to confirm from the list to open (Remember that for the Jobs to appear here in the Pending section, you must first click on the "Invoice" icon as explained in the previous slide).

Enter the **Invoice number**, **Invoice Date** and **Tax point** date.

In the "Invoice" section you can review the figures and amounts of the invoice.

Confirming the **Invoice (Part 2)**

In the **"Details"** section you can review the various claim and VAT details, addresses, etc…

Company: GT Motive Insurance | Supplier: Training Repairer | Created by: trainrepairer | Date of creation: 12/02/2021 10:26   ● Draft

Invoice number
25/2021

Invoice Date
📅 12/2/2021 ✕

Tax Point
📅 12/2/2021 ✕

Invoice | **Detail** | Attachments | Summary | Messages   ☁ Download

VAT Detail

Registered Business Address
Training Repairer
198 Uxbridge Rd
Shepherd's Bush
London
W12 7JP
VAT Id
02568509

Repair Site Address
Training Repairer
198 Uxbridge Rd
Shepherd's Bush
London
W12 7JP

Billing Address
GT MOTIVE, S.L. AREA #5
Shepherd's Bush   s/n
London
VAT Id
B15500582

Claim Summary

Claim Number
TRAINING0009

Claim Reference
TRAINING0009

Estimate ID
CLM2250

Policy Number
TRAINING0009

Excess
150

VAT Reg.
No

Reference Name
PAUL SMITH

Engineer Reference
Training Engineer

Vehicle

Make
AUDI

Model
A1

Registration number

ℹ If you agree with the figures displayed, please enter the required information and click the Confirm button. If not, contact your work provider.   Cancel | **Confirm**

Use the Attachments section to add any documents and the Messages section to write any messages you may need to send.

25/2021   📅 12/2/2021 ✕

Invoice | Detail | Attachments | Summary | **Messages**   ☁ Download

Created by   Message   Date of Message

Send Message

25/2021   📅 12/2/2021 ✕

Invoice | Detail | **Attachments** | Summary | Messages

☁ Upload

Finally, once you've reviewed all the invoicing information, click on **"Confirm"** to confirm the invoice.

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Tracking the **Invoice**

Once you've confirmed the invoice it will be transferred to the **"Tracking"** tab, from where you can see it is in a **"Pending Status"** until it's accepted by the Work Provider:

In the **"Summary"** section you can see the status of the invoice.

The **Invoice has been Completed**

Once the invoice has been accepted by the Work Provider, it will be transferred to the "Completed" tab, from where you can see it is in a "Completed" status:

In the "Summary" section you can see the status of the invoice.

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Other Useful Functions

Reviewing the **Estimate Report**

Click on the estimate amount in the Estimate Management Card to review the GT Estimate Report if you wish. Click on "Modify" to modify the estimate if required. You can return to the job overview from the estimate report area by clicking on "Done".

Reviewing the **Estimate History of the Job**

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

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

Reviewing the **Changes Between Estimates (Part 1)**

In the Estimate history page, 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:

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

Reviewing the **Changes Between Estimates (Part 2)**

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"**:

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.

Viewing the Photos **Whilst Reviewing the Estimate**

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 **Activity Log**

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…:

Declaring the **Job as Final**

Under some circumstances the Work Provider **may require you to declare the Job as "Final"**, that is to say, that it is your final estimate regarding what you consider the repairs to the vehicle should be.

You can do this by **marking the "Final" check** in the upper area of the job management screen: