



It's easier to leaseplan

Internet Quotations: Fleet Managers Manual

Version:

3.1.1



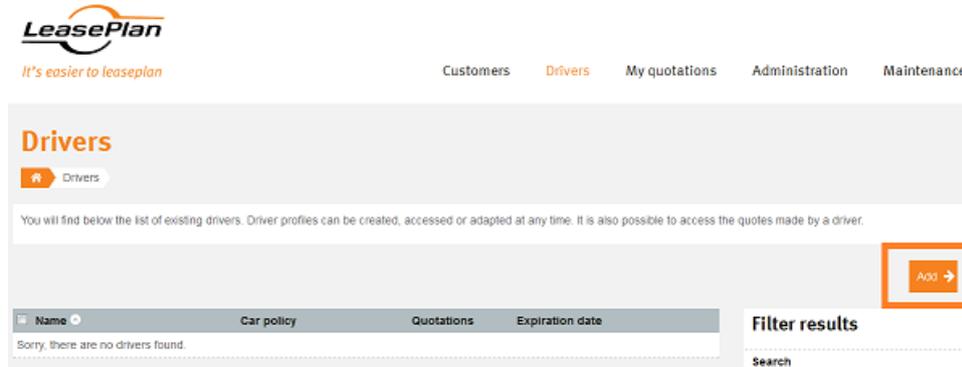
1.	Create and manage a driver profile	3
1.1	How to create a new driver profile	3
1.1.1	Identification of the driver	3
1.1.2	Additional information	4
1.1.3	Driver access limitations	5
1.1.4	Confirm and provide the driver with access details	6
1.2	How to manage driver profiles	6
1.2.1	Check the details of a certain driver profile	6
1.2.2	Edit an existing driver file	6
1.2.3	Delete an existing user profile	7
1.2.4	Check the quotation(s) that were created by the driver	7
1.2.5	Detect an outdated driver profile	9
2.	Order a vehicle	10
2.1	What happens if a driver orders his vehicle directly?	11
2.2	What happens if a vehicle is ordered through an approval procedure?	11
2.3	How can an ordered vehicle be identified in the quotations list?	12
3.	Manage my user settings	13
3.1	How to change the number of displayed results per page?	13
3.2	How do you receive a confirmation e-mail when you request an official quotation in PDF?	13
3.2.1	Receive a confirmation e-mail	13
3.2.2	Receive an e-mail with the PDF quotation as attachment	14
3.2.3	Send the e-mail (with or without attachment) to a different e-mail address	14



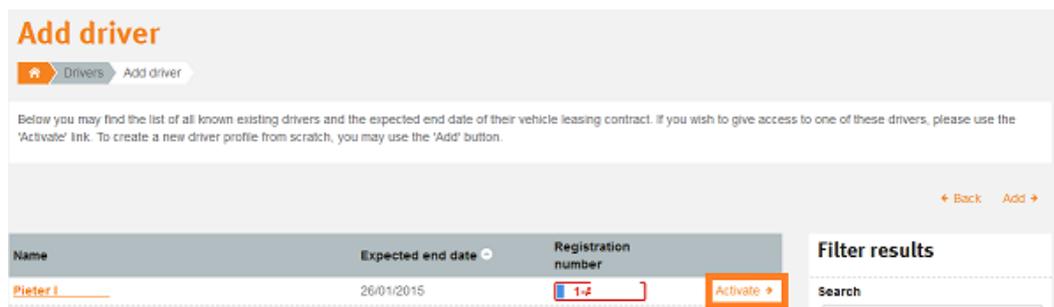
1. Create and manage a driver profile

1.1 How to create a new driver profile

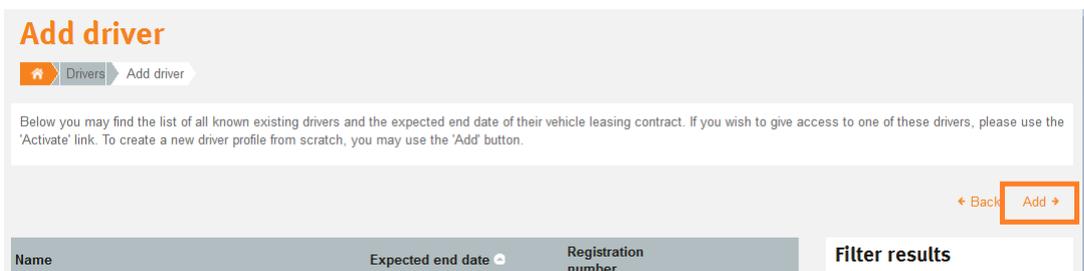
To create a new driver profile, click the 'Add' button:



If you have fleet cars under contract with LeasePlan, you will first see a list with all the currently known drivers and the expected end dates of the leasing contract for their vehicle. You can start from this list to create a driver profile. Click the 'Activate' link in the row of the selected driver:



If you do not have fleet cars or you want to create a driver profile from scratch, click the 'Add' button again.



1.1.1 Identification of the driver

The first step when creating a driver profile consists of identifying the user (e.g. the driver). Contact details such as first name, name and e-mail address must be entered.

Driver

First name *

Last name *

E-mail address *

1.1.2 Additional information

The second step is to grant specific rights and permissions to the driver.

Additional information

Car policy
BPOST CAT 760

Free car policy
→ Yes No

Order allowed
→ Yes No

Direct order allowed
→ Yes No

? The driver is authorized to directly order his vehicle without validation cycle via the Fleet Manager.

Information visibility

Show prices
→ Yes No

Show discounts
→ Yes No

Show contract details
→ Yes No

Show mileage and duration
→ Yes No

- Car policy: The driver is linked to the selected driver category, in other words, to a car policy with a specific maximum budget, authorised brands, mandatory options, etc. The drop-down list contains all the driver categories that exist in our system for your company. If you want to add a category or if you want to modify the limitations for a single category, please contact your account team at LeasePlan.
- Order authorised: enables the driver to inform LeasePlan or the Fleet Manager that the driver wishes to order a vehicle. An 'Order' button is displayed in the 'Result' section of a quotation, so the driver can complete the order form. If this checkbox is not selected, the driver can only create a quotation and not place an order.
- Direct order authorised: this box is only available if the 'Order authorised' box is selected. If it's selected, the driver can order the car directly without verification or approval by the Fleet Manager.

In this case, an e-mail is sent to LeasePlan with the details of the vehicle that needs to be ordered. The Fleet Manager is put in cc of this e-mail. However, if this box is not selected and the driver can still order, the order e-mail is only sent to the Fleet Manager with the driver in cc. The Fleet Manager must then confirm the order in the program so LeasePlan is informed about the vehicle order.

- Show prices: if this box is selected, the driver can see all prices, budgets or catalogue prices (vehicles and options). If this box is not selected, the prices are hidden from the driver.
- Show discounts: this box is only available if the 'Show prices' box is selected. If this box is selected, the driver can see all the details about the different fleet discounts and extra discounts that apply to the vehicles. If necessary, the driver can also add extra discounts.
- Show contract details: if a driver can choose between different contracts when creating a quotation, the driver can use this box to see the details of this contract (which leasing services are included).

1.1.3 Driver access limitations

The third and last step is to define the access limitations for the driver profile.

Restrictions

Maximum number of quotes

50



Expiration date *

Block access

? The driver access to Internet Quotations is blocked during the time slot defined below.

- Maximum allowed quotations: the maximum number of quotations that the driver is allowed to create. This number includes quotations that were deleted by the driver.
- Expiry date: the final date for the driver to access Internet Quotations. Access will be refused automatically after this date.
- Block access: the Fleet Manager can set a period during the day when the driver does not have access to Internet Quotations.



This blocked period can be managed on a daily basis (e.g. from Monday to Friday but not on Saturday and Sunday).

1.1.4 Confirm and provide the driver with access details

When all the settings have been made, you need to confirm the profile ('Confirm' button) to create it. The driver profile is added automatically to your drivers list.

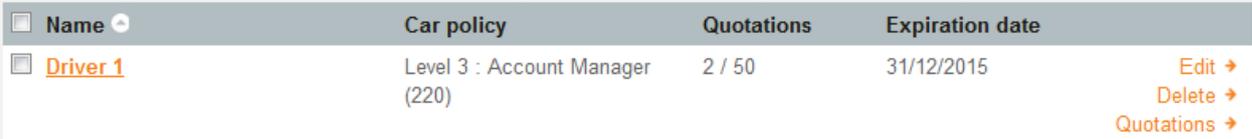
The driver receives an e-mail with a link to the website where he can choose a password. He can then log in and create quotations.

A manual for the driver is available to help him use Internet Quotations correctly.

1.2 How to manage driver profiles

1.2.1 Check the details of a certain driver profile

All driver profiles created by a Fleet Manager are saved in the 'Drivers' section. This is normally the first page which is displayed after logging on. All drivers are displayed in a list which is sorted alphabetically by default. However, the user can sort drivers by other criteria such as name, car policy, number of created quotations and expiry day. To do this, he clicks the title at the top of each column.



Name	Car policy	Quotations	Expiration date	
Driver 1	Level 3 : Account Manager (220)	2 / 50	31/12/2015	Edit → Delete → Quotations →

To open a driver profile, click the hyperlink with the name of the driver.

1.2.2 Edit an existing driver file

There are two ways to edit a driver file:

- Click the [Edit](#) → link in the row of the driver in question.

- Or click the 'Edit' button in the details section for the driver

Driver details

Drivers > Driver details

You will find below the profile details of the selected driver.

← Back Delete **Edit** Quotations →

Driver 1
E-mail address ivanbellegem@hotmail.com

Fleet manager
Gerry Van Aken
E-mail address gvanaken@leaseplan.be

Internal user: No
Relation ID: 982383
Language: English
Car policy: Level 3 : Account Manager (220)

Contact →

1.2.3 Delete an existing user profile

If necessary, a driver profile can be deleted from the list of existing drivers by clicking the link in the row of the driver in question.

Name	Car policy	Quotations	Expiration date	
<input type="checkbox"/> Driver 1	Level 3 : Account Manager (220)	2 / 50	31/12/2015	Edit Delete Quotations

Then you must confirm that you want to delete the driver in a second step. Clicking the 'Delete' button deletes the driver profile permanently. To cancel the deletion action, click the 'Back' button to stop deleting. A deleted driver no longer has access to Internet Quotations.

1.2.4 Check the quotation(s) that were created by the driver

You can trace all quotations that the driver created. To do this, click the link in the row of the driver in question.

Name	Car policy	Quotations	Expiration date	
<input type="checkbox"/> Driver 1	Level 3 : Account Manager (220)	2 / 50	31/12/2015	Edit Delete Quotations

This displays the list of all quotations that were created by this driver. Note that drivers who are not authorized to view prices have a different view than yours because the prices are hidden. You can click the 'Details in PDF' button in the 'Result' section of a specific quotation to obtain a detailed quotation with all elements.

Result

My quotations → Result

Configuration Model type Actions Equipment **Result**

Monthly rental
590,15 EUR
(50% VAT & CO2 participation included)
Monthly contribution 0,15 EUR

Volvo V60 1.6 D2 Summum Powershift Aut

You may find below an overview of your quotation results. For more details, it is possible to download it in PDF format.

My quotations → New quotation → **Details in PDF** → Order →

Quotation		Monthly rental	
Number:	1.051.572	VAT excluded:	499,38 EUR
Duration:	60	50% VAT:	551,00 EUR
Km/year:	30.000	65% non recoverable VAT:	566,48 EUR
Date:	24/01/2015	VAT included:	602,62 EUR
Valid until:	22/02/2015		

Make, model and type		Monthly rental and CO2 participation	
Make:	Volvo	VAT excluded:	538,53 EUR
Model:	V60	50% VAT:	590,15 EUR
Model type:	1.6 D2 Summum Powershift Aut	65% non recoverable VAT:	605,63 EUR
CO2 category:	B	VAT included:	641,77 EUR
CO2 emission:	110 g/km		
CO2 participation:	39,15 EUR		

Customer		Car policy	
Name:	Bekaert nv	Amount is VAT excluded	
Number:	405.388.536	Monthly contribution:	0,15 EUR
Contract:	48.636		
Cost center:	48.636		
Car policy:	B8-B9 (200)		

Information	
Net investment amount:	25.784,74 EUR
Yearly benefit in kind:	2.375,32 EUR
Monthly benefit in kind (indicative):	197,94 EUR

A request is sent to create an official quotation. This process may take a few minutes. The user is informed when the PDF file is available, via:

- An e-mail informs the user that the file is available online (this feature needs to be activated in 'My profile'; see [How to receive a confirmation e-mail when you request an official quotation in PDF?](#))
- An e-mail with the PDF file attached (this feature needs to be activated in 'My profile'; see [How to receive a confirmation e-mail when you request an official quotation in PDF?](#))
- A new link in the quotations list that is displayed just before the brand and model.

Date	Make, model and type	Number	Duration	Km/year	Policy	Rent	Contribution	Benefit	
30/01/2015	Audi A4 2.0 Tdi	9339022	48	30.000		717,07 EUR		2.024,74 EUR	Order → Delete ↓ Display the PDF →

Note that you may need to refresh the page in your internet browser in order to display the icon that indicates when the file is ready.

The PDF file is always provided in the language used to request the PDF file. If the user wants to receive the PDF file in a different language, he can change the language and then click 'Details in PDF' to launch a new request.

A driver can also request a PDF quotation, but the layout is modified accordingly if he does not have the authorisation to view prices or discounts. In this case, the Fleet Manager receives a different PDF file (with all the details) than the file sent to the driver (limited information).

1.2.5 Detect an outdated driver profile

When the expiry day of a driver profile is exceeded, the Fleet Manager is informed by means of a  icon which is displayed automatically in the drivers list, to the right of the date.

<input type="checkbox"/>	Test Bestuurder	Level 1 : Executive (200)	7 / 50	30/04/2014 	Edit → Delete → Quotations →
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2. Order a vehicle

The order a vehicle option is not available for all drivers. The Fleet Manager has the option to activate this parameter and make the order procedure available at driver level (see the [Additional information](#) section). However, the method for ordering a vehicle is still the same for a driver and for a Fleet Manager.

To order a vehicle, the user must complete an order form.

This form is opened from the quotation by clicking the [Order](#) link in the quotations list (in the 'My quotations' section if the Fleet Manager created the quotation, or in the list of driver quotations if the driver prepared the quotation) or the 'Order' button (in the 'Result' section of the selected quotation).

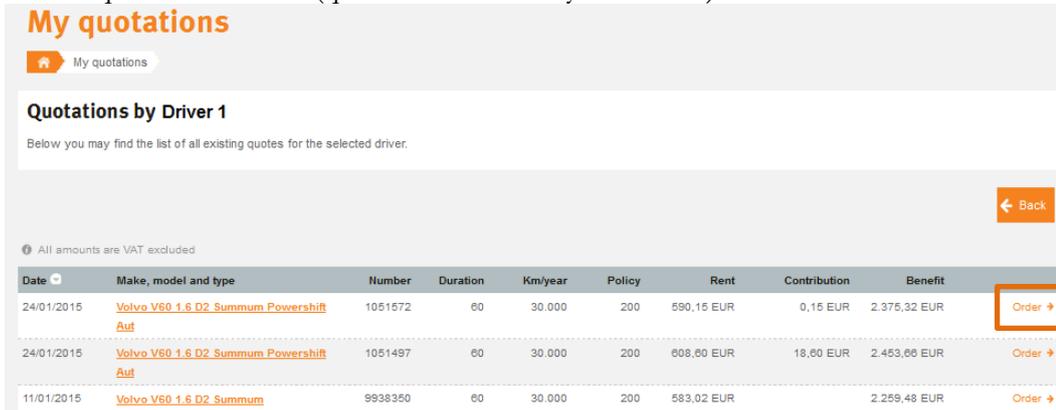
- 'My quotations' menu (quotation created by the Fleet Manager):



The screenshot shows the 'My quotations' interface. At the top, there is a header 'My quotations' and a sub-header 'My quotations'. Below this, a message states 'Below you may find the list of your existing quotes.' A 'New quotation' button is located in the top right corner. A note indicates 'All amounts are VAT excluded'. The main content is a table with the following columns: Date, Make, model and type, Number, Duration, Km/year, Policy, Rent, Contribution, and Benefit. Two rows of quotations are visible. The first row is for an Audi A4 2.0 Tdi, and the second is for a Maserati Ghibli 3.0 D Aut. An 'Order' button is highlighted in the rightmost column of the first row. Other buttons like 'Display the PDF' and 'Delete' are also visible.

Date	Make, model and type	Number	Duration	Km/year	Policy	Rent	Contribution	Benefit	
30/01/2015	Audi A4 2.0 Tdi	9339022	48	30.000		717,07 EUR		2.024,74 EUR	Order
08/10/2014	Maserati Ghibli 3.0 D Aut	9223522	48	30.000		1.598,87 EUR		6.919,82 EUR	Display the PDF Delete

- Driver quotations menu (quotation created by the driver):



The screenshot shows the 'Driver quotations' interface. At the top, there is a header 'My quotations' and a sub-header 'My quotations'. Below this, a message states 'Below you may find the list of all existing quotes for the selected driver.' A 'Back' button is located in the top right corner. A note indicates 'All amounts are VAT excluded'. The main content is a table with the following columns: Date, Make, model and type, Number, Duration, Km/year, Policy, Rent, Contribution, and Benefit. Three rows of quotations are visible, all for Volvo V60 1.6 D2 Summum Powershift Aut. An 'Order' button is highlighted in the rightmost column of each row.

Date	Make, model and type	Number	Duration	Km/year	Policy	Rent	Contribution	Benefit	
24/01/2015	Volvo V60 1.6 D2 Summum Powershift Aut	1051572	60	30.000	200	590,15 EUR	0,15 EUR	2.375,32 EUR	Order
24/01/2015	Volvo V60 1.6 D2 Summum Powershift Aut	1051497	60	30.000	200	608,60 EUR	18,80 EUR	2.453,66 EUR	Order
11/01/2015	Volvo V60 1.6 D2 Summum	9938350	60	30.000	200	583,02 EUR		2.259,48 EUR	Order

- 'Results' section:

Result

My quotations Result

Car policy Contract Cost center Configuration Model type Actions Equipment Result

Monthly rental
717,07 EUR
(VAT excluded)

Audi A4 2.0 Tdi

You may find below an overview of your quotation results. For more details, it is possible to download it in PDF format.

My quotations → New quotation → Details in PDF → **Order** →

Quotation		Monthly rental	
Number:	9.339.022	VAT excluded:	717,07 EUR
Duration:	48	50 % VAT:	791,85 EUR
Km/year:	30.000	65% non recoverable VAT:	814,28 EUR
Date:	30/01/2015	VAT included:	866,63 EUR
Valid until:	28/02/2015		

Monthly rental and CO2 participation

The user must enter the latest information in the order form to place the order for the car:

- Contact details of the driver,
- Colour of the vehicle (interior and paint colour),
- Contact details of the dealer (if not selected by LeasePlan)
- Optional details about provisional car
- Specialist winter tyres

When all the mandatory fields are completed, the user confirms the order by clicking the 'Order' button at the bottom of the order form.

There are two options: the driver orders his vehicle directly, or he orders it through an approval procedure.

2.1 What happens if a driver orders his vehicle directly?

In this case, the completed form must be e-mailed directly to LeasePlan (and specifically to the Fleet Advisor) with the responsible Fleet Manager in cc.

2.2 What happens if a vehicle is ordered through an approval procedure?

In this case, the Fleet Manager is informed by e-mail that the driver (in cc) wants to order a vehicle. The Fleet Manager is requested to check the quotation online (see the section 'Check the quotation(s) that were created by the driver') and to finalise the order, unless the quotation does not meet the requirements of the company policy. To finish the order, the Fleet Manager must have access to the order form and click the 'Confirm' button.



2.3 How can an ordered vehicle be identified in the quotations list?

When a vehicle is ordered, a  icon is displayed in the row of the corresponding quotation in the 'My quotations' section.

Date	Make, model and type	Number	Duration	Km/year	Policy	Rent	Contribution	Benefit	
30/01/2015	Audi A4 2.0 Tdi 	9339022	48	30.000		717,07 EUR		2.024,74 EUR	Delete → Display the PDF →

3. Manage my user settings

3.1 How to change the number of displayed results per page?

When a list of items is displayed in Internet Quotations (e.g. options, model versions, etc.), the program shows 25 results per page by default and several pages are generated when there are more than 25 results. The user can increase or decrease the number of results to be displayed per page. A button is available at the bottom of each page to modify the number of results per page:



3.2 How do you receive a confirmation e-mail when you request an official quotation in PDF?

The user can request an official quotation with all the details about the chosen vehicle. This quotation is prepared in PDF format. (If you want to know how you can request a PDF quotation, see [Check quotation results and request an official quotation in PDF.](#))

3.2.1 Receive a confirmation e-mail

The PDF quotation can be consulted in Internet Quotations, but it may take a few minutes after the creation request for the quotation to appear online. For this reason, the user can request that he is informed by e-mail about the availability.

To receive this confirmation, the user must go to 'My profile' and click 'Settings'. In this menu, the user must choose 'Yes' under the following parameters

PDF

Send a confirmation e-mail

Yes No

When a request for a detailed PDF quotation is made, the user receives a confirmation e-mail when the quotation is available online.

Send the PDF as attachment

Yes No

Also send to another address

Yes No

Please check this box if you wish to also send the confirmation e-mail (with or without attachment) to another e-mail address.

→

When these parameters have been chosen, the user can confirm the changes. If a PDF quotation was requested, an e-mail is sent automatically to the user's e-mail address.



3.2.2 Receive an e-mail with the PDF quotation as attachment

In addition to the option of receiving a confirmation e-mail, the prepared PDF quotation can also be sent as attachment.

To receive this quotation by e-mail, the user must go to 'My profile' and click 'Settings'. In this menu, the user must choose 'Yes' under the following parameters

PDF

Send a confirmation e-mail

Yes No

When a request for a detailed PDF quotation is made, the user receives a confirmation e-mail when the quotation is available online.

Send the PDF as attachment

Yes No

Also send to another address

Yes No

Please check this box if you wish to also send the confirmation e-mail (with or without attachment) to another e-mail address.

Confirm →

When these parameters have been chosen, the user can confirm the changes. If a PDF quotation was requested, the PDF is sent automatically as attachment to the user's e-mail address.

3.2.3 Send the e-mail (with or without attachment) to a different e-mail address

All e-mails are sent by default to the e-mail address entered in 'My profile'.

My profile

My profile

Below you may find the details of your user profile.

Driver 1

E-mail address driver1@IQ.be

The user can choose a different e-mail address for sending the confirmation e-mail or the attachment (e.g. a personal e-mail address) when a PDF quotation is requested. To add a second e-mail address, the user must go to 'My profile' and click 'Settings'. In this menu he must click 'Yes' under 'Also send to a different address' and enter the e-mail address to be used:

PDF

Send a confirmation e-mail

Yes No

? When a request for a detailed PDF quotation is made, the user receives a confirmation e-mail when the quotation is available online.

Send the PDF as attachment

Yes No

Also send to another address

Yes No

? Please check this box if you wish to also send the confirmation e-mail (with or without attachment) to another e-mail address.

E-mail address *

driver1@privateemail.be

Confirm →

After choosing these parameters and entering the e-mail address, the user must confirm this modification. Subsequently, all e-mails will be sent automatically to the user's second e-mail address when a PDF quotation is requested.

