

# How to Request a Valuation from web

Initiate the valuation process by submitting a valuation request.

Starting the valuation process involves several steps:

- When a client needs to have their vehicle valuated, they can make a request directly from the dealership.
- The sales executive responsible for handling this request submits the customer's information and basic vehicle details into the system.
- Following this, the sales executive can either schedule a visit to assess the vehicle in person or guide the customer through conducting a self-inspection.

## Who can use it:

Sales Executives

Account Managers

Dealership Principles

Administrators

## When to use it:

1



### When a vehicle is to be pushed back into the market

To do this, the seller must understand the value their vehicle has in order to put a price on it for potential buyers. With the auction offering, the vehicle is inspected and valuated by sales executives to list the vehicle at an appropriate market related value.

2

### When the seller enquires about the value of their vehicle for a future sale

There are often cases where a client is two-minded about whether or not it is a good time to sell a vehicle. To assist them in this decision, the client may opt to request a valuation so that they have an idea regarding the potential sale value of their vehicle.

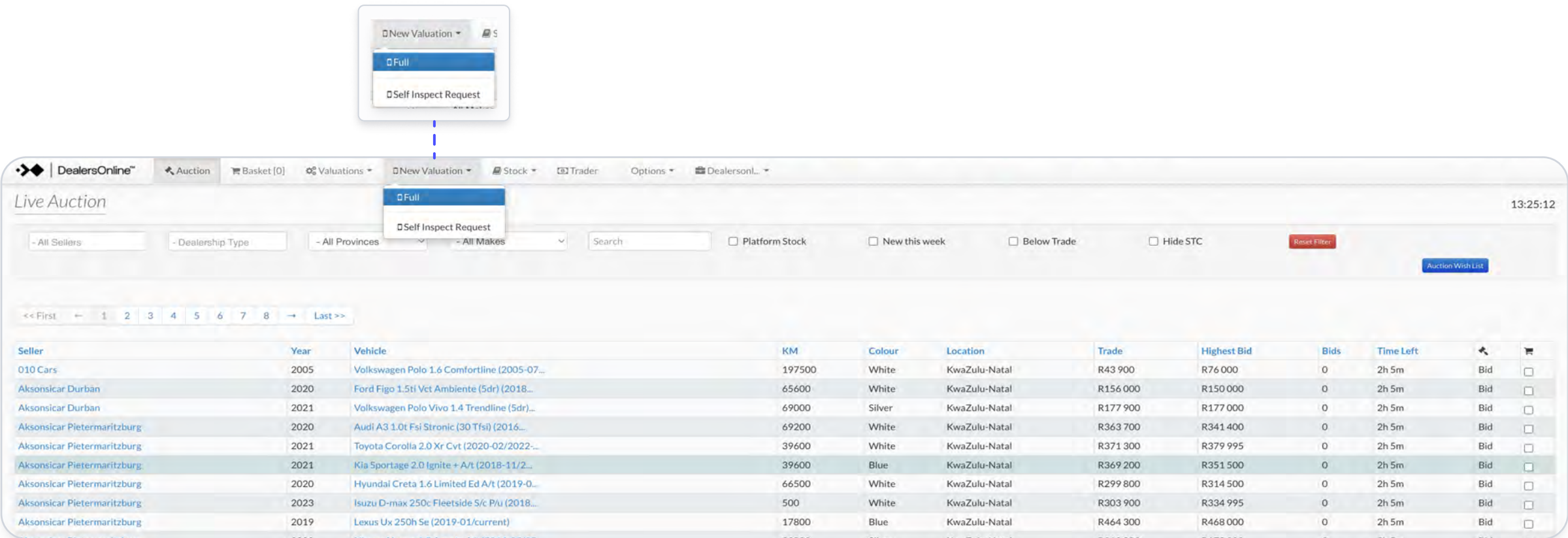




# Where to find it:

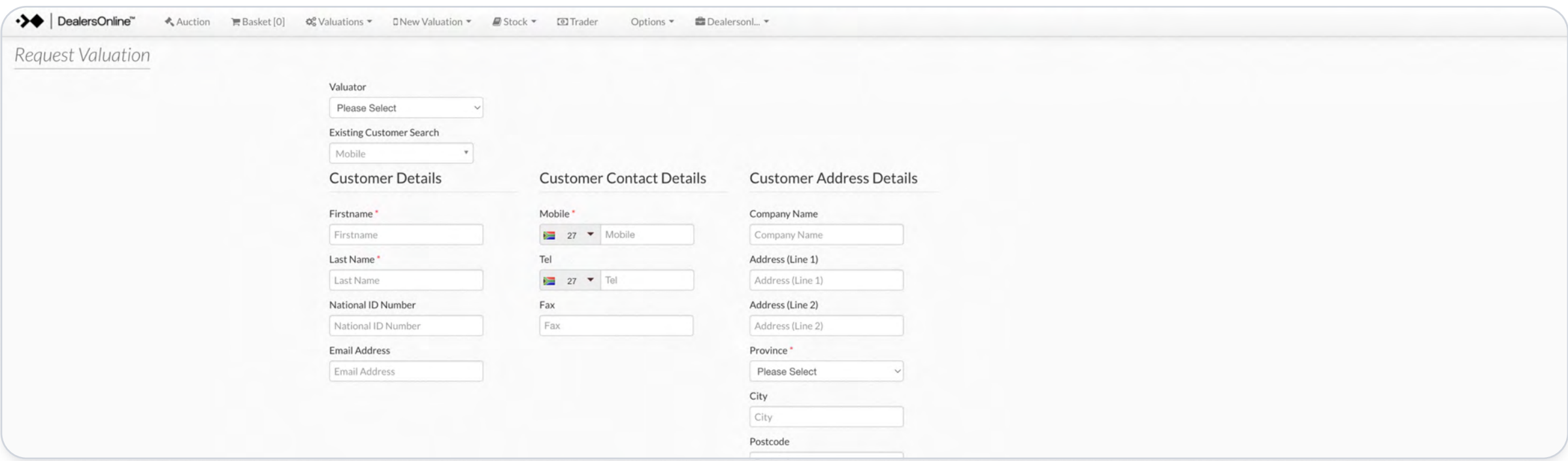
1

From the Live Auction dashboard, **select ‘New Valuation’** from the navigation bar and then click on **‘Full’** from the drop-down menu.



2

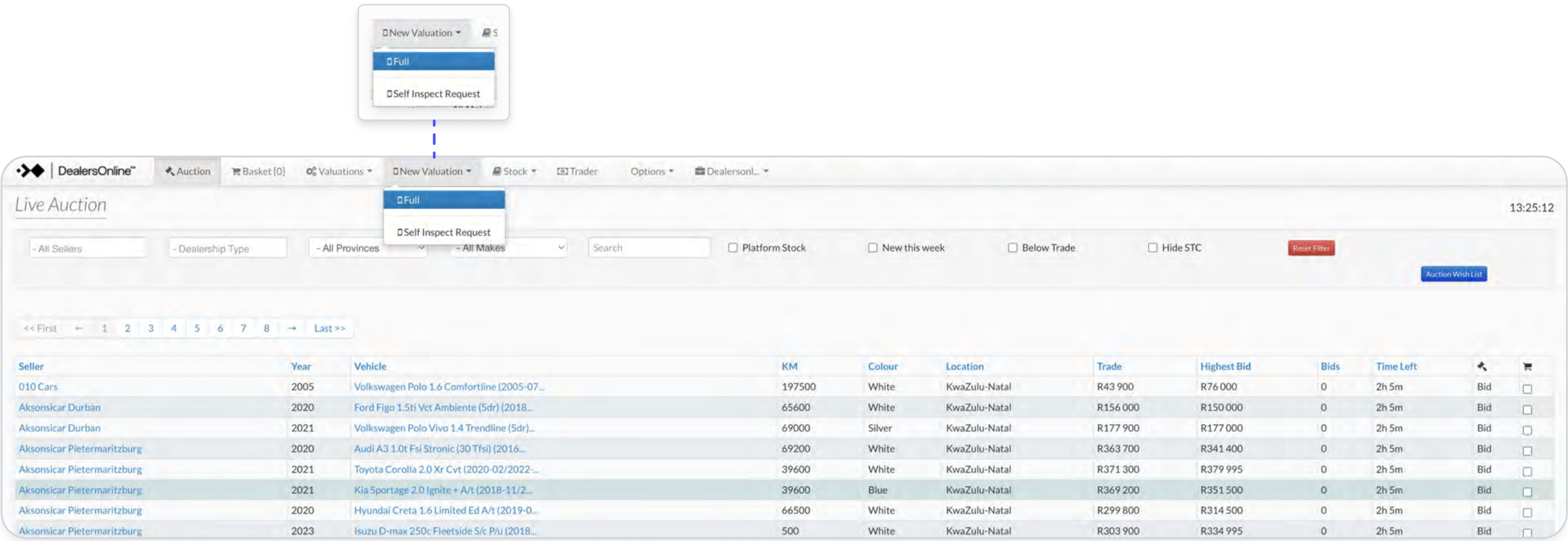
The **‘Request Valuation’** form is now on your screen to be completed.



# How to use it:

## 1. Access Full Valuation

From the Live Auction dashboard, select **‘New Valuation’** from the navigation bar and then click on **‘Full’** from the drop-down menu.





## 2. Capture Valuation Details

On this screen, complete the **‘Request Valuation’** form to submit an inspection request to the valuator.

DealersOnline™AuctionBasket [0]ValuationsNew ValuationStockTraderOptionsDealersoni...

Request Valuation

Valuator

Please Select

Existing Customer Search

Mobile

Customer Details

Customer Contact Details

Customer Address Details

Firstname \*

Firstname

Last Name \*

Last Name

National ID Number

National ID Number

Email Address

Email Address

Mobile \*

27 Mobile

Tel

27 Tel

Fax

Fax

Company Name

Company Name

Address (Line 1)

Address (Line 1)

Address (Line 2)

Address (Line 2)

Province \*

Please Select

City

City

Postcode

## 3. Await Valuation Confirmation

Once the Valuation Request is created the sales manager or dealer principal will assign the valuation to a sales executive to conduct the inspection.

## 4. Initiate Valuation Inspection

The inspector will conduct the inspection using the mobile app.

## 5. View Completed Valuation

Once the inspection is completed, the valuation can be seen in the **'Valuation Grid'** from the desktop platform. Here, the valuation can be edited, the vehicle can be viewed, or the vehicle can be transferred to auction.

DealersOnline™AuctionBasket [0]ValuationsNew ValuationBecome A TraderOptionsDealersoni...

Valuations

FilterReset FilterExport

☐ Not Done☐ Done☐ Stock Filter☐ Archive records

ID	Reg No	Customer	Vehicle	Mileage	Location	Manager Offer	Max Offer	Reserve Price	Final Offer	Sales Consultant	Status	Date Inspected	Date Created		Deal Done
2485424	NH237	Greg Kusel	2015 Honda Jazz 1.5 Elegance (2011-02/2015-01)	90172	Western Cape	0	R0	0	--	Greg Kusel	Open For Offers	12 Mar 2024 10:27	11 Mar 2024 19:04	⚙️	<input type="checkbox"/>
🔍🚗📄🔗📧📧📧📧📧📧📧📧📧📧📧📧															
2485630	CJ23158	Amie Grier	2009 Kia Picanto 1.1 Lx (2008-02/2010-03)	83938	Western Cape	0	R0	0	--	Greg Kusel	Open For Offers	12 Mar 2024 09:49	12 Mar 2024 09:06	+	<input type="checkbox"/>
2485433	CAW16017	Joel Veysie	2014 Volkswagen Polo 1.4 Comfortline 5dr (2010-01/...	157341	Western Cape	0	R0	0	--	Greg Kusel	Open For Offers	12 Mar 2024 07:43	11 Mar 2024 22:06	+	<input type="checkbox"/>
2485003	CAA185233	Richard Scott Martin	2019 Bmw 3 Series 320i M Sport A/t (f30) (2015-08/...	40000	Western Cape	290000	R0	0	0d 0h	Greg Kusel	Open For Offers	11 Mar 2024 14:29	11 Mar 2024 14:19	+	<input type="checkbox"/>
2478324	028292	Jeked	2020 Bmw X1	64543		0	R0	0	--	Kelsey	Valuation		4 Mar	+	<input type="checkbox"/>