HOP Quick Reference Guide

Login
Google Chrome (the latest version) is the recommended browser.
Username and password are both case sensitive.

Home page

⌂ Home

ⓘ Find all of your training resources here

⚙ If you are in a quote or an application you can change between brands midway, prior to saving. The details you have already added will copy over to the new Brand.

➡ Sign out. Keep your application secure by signing out when you are away from your computer. The session will timeout after an hours idle time.

How to create a quote
For a simple way to create a new quote:

1. Choose a **Brand** on the Home page and select your **Product** using the drop down arrow. Depending on the Dealership there can be more than one Brand showing on your Home page.

2. You will be taken to the first Quote page to populate the fields.
   - Fields with a red asterisk are required to be populated.
   - Use calculators and calendar icons to populate a field if preferred.

Search for your quote / Check status

To search for a recent quote or to check a status: Click on the **Brand** Icon on the Home page. The last 10 pages of quotes will be displayed here. To advance search within these 10 pages click on the magnifying glass icon at the top of each column.

To advanced search: To search for all quotes, including **historic quotes** which have moved beyond the first 10 pages, click on the **Brand** on the Home page and use the main magnifying glass icon at the top right of the Search page.

Edit / Delete a quote
Find the quote on the search page. Click on the **ID No** of the quote and select either Close, Edit or Delete in the Application Details pop up box. A quote can also be deleted using the rubbish bin icon on the Search page.

[Close] [Edit] [Delete]

You can edit an application when it's in the following statuses:

Status	Sub Status
NEW	
NEW	QUOTE
NEW	WAITING FOR ADDITIONAL INFORMATION
REFERRED	WAITING FOR ADDITIONAL INFORMATION
APPROVED	
CONDITIONED	
APPROVED	BACK TO DEALER
CONDITIONED	BACK TO DEALER
DECLINED	

Print a quote
Bring a quote up and navigate to the **Summary** page. Scroll down until you reach the [Print Quote] icon at the bottom.
Documents attached to the quote can be printed from the **Search page** by clicking on the printer icon.

Status meanings

Status	Sub Status	Meaning
NEW		Application currently in progress.
NEW	QUOTE	A quote that hasn't been submitted created.
NEW	REVIEW REQUIRED	Can neither approve nor decline. Has gone to Credit Team for review.
CONDITIONED		Approved with conditions.
REFERRED		Can neither approve nor decline. Has gone to Credit Team for review.
WITHDRAWN		Application cancelled.
DECLINED		Declined.
APPROVED / CONDITIONED	DOCUMENTS RECEIVED	Documents received by the Payouts Team.
APPROVED / CONDITIONED	FINAL DOCUMENT CHECK	Documents going through final check with Payouts Team.
APPROVED / CONDITIONED	VERFIED	Documents verified by Payouts team.
APPROVED / CONDITIONED	FUNDED	Money has been advanced.

New features

Self-populate: Certain fields will self-populate and carry through to other parts of the application, saving you time.

Flexible payments: Choose Flexible under the Payment type. Select O (Zero payments), A (Additional payments) or I (Inclusive payments), choose the payment sequence in the From and To fields, and enter the amount. Use the + button to add further flexible payments or the – button to remove. See the payment schedule summary or click on the Full Schedule icon to see the updated payment schedule.

Settlement figure for an existing loan: Can be obtained when populating the 'Trade In' amount on the Quotes page. This will bring up a 'Money Owed on Trade-in' field. Click on the calculator icon. Enter an existing registration number or client number, enter a valid Settlement Date (this should be set to the delivery date), tick to consent, and confirm by selecting the Calculate Amount button. The amount will calculate based on the information in the customer's account. Early settlement fees are excluded. The settlement quote does not include future payments.

First repayment date: Customer can choose when they would like to begin their repayments. E.g. if they are on a fortnightly repayment plan their start date can be up to 13 days in advance.

Promo: Tick the Promo box under the Payment Type and a pre-arranged promotional code can be entered to amend repayment details.

Accessories: You can add accessories to the quote by selecting from the drop down menu in the Accessories screen. This will update the purchase price and re-calculate the application accordingly.

Existing customer search: Pull through customer details that are already on our system. To bring up the option to do a Customer Search, enter the First Name, Last Name and Date of Birth in the Applicants page and click on the **Customer Search** button. Add customer to the application by selecting the + icon. **Validate the identification** by selecting the identification check and then select the **Add Applicant** button. Ensure you tick the verification icons to confirm that the information pulled through is still current.

Driver License and Passport search: Validate a New Zealand passport and/or drivers license as identification.

Address & Company Registration details field: As you begin to type details into the address field the system will prompt an auto populated address. By choosing the suggested address the address will be validated. This is also the case with the Company Name entry. Validated entries remove the possibility of errors and offer a quicker response time.

Validation and Liabilities for Co-Borrowers: For a Single Applicant with Marital Status of De-facto/Married the total household liabilities should be entered i.e. full rent, loans, credit cards etc. Include the Spouse's income in the Other Income field for an accurate household income/liability affordability test. If the De facto is to be added as a Co-Borrower ensure the liabilities that are already entered are not duplicated.

Mid application change: Change the branch or brand mid application by going to the home page and clicking on the cog icon.

Clone icon: Clone a quote and application to save time when entering a customer who is interested in comparing more than one asset.

Where to go for further help?

Contact your Relationship Manager for further support.

• Dealer Support (Mon-Fri)	0800 85 40 40	• Credit Approvals	0800 52 08 08
•Autosure	0800 26 78 73	• Customer Service	0800 85 30 30
•Collections	0800 42 08 42		

What version of Google Chrome supports HOP?

Ensure you have the latest version of Google Chrome installed on your computer.

What do I do if I have forgotten my password?

On the Login page click on the Forgot my password link and you will be prompted to reset your password. An email will be sent to you with a temporary password. You will be asked to update your password when you next log in.
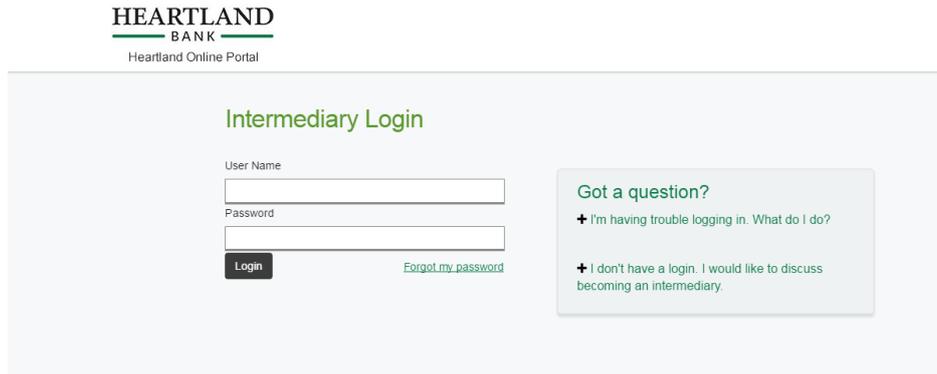
If my session times out mid application will the system auto-save my application or quote?

Yes, provided you have saved your application or quote. The system will save at the point of the last completed page.

Why can't I edit or access my quote?

You won't be able to edit or access a quote while it is being reviewed. You can edit an application when it's in the following statuses:

Status	Sub Status
NEW	
NEW	QUOTE

You can edit a quote, add/edit security and add additional parties in the following statuses:

| Status	Sub Status
NEW	WAITING FOR ADDITIONAL INFORMATION
REFERRED	WAITING FOR ADDITIONAL INFORMATION
APPROVED	
CONDITIONED	
APPROVED	BACK TO DEALER /EXPIRED
CONDITIONED	BACK TO DEALER /EXPIRED
DECLINED	

Where do I find my base rate and commission?

The small numbers at the bottom of the screen indicate the buy rate / commission rate / sell rate. The commission rate will not display until the quote is saved.

The 'Money Owed on Trade-In' field is not populating.

The Money Owed on Trade-In field will only appear when a Trade In amount is entered.

Click on the calculator icon to the right of the Money Owed on Trade-In field.

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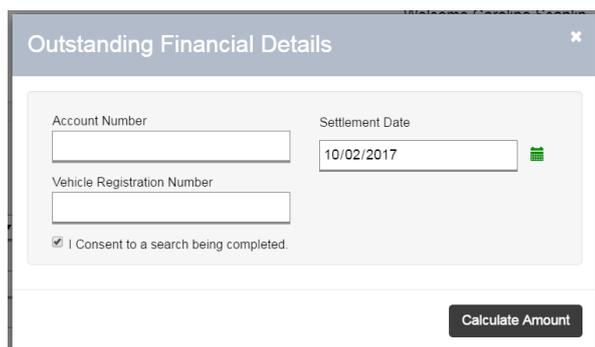
Account Number:	When entering an account number use dashes (not dots or spaces).
Settlement Date:	Can be set to the delivery date (does not include future payments i.e. if settlement date is set for 1 weeks' time but a payment is due out before then, it will not include that payment).
Vehicle Registration Number:	This field is case sensitive (must be in caps).
I Consent to a search:	Tick to bring up the Calculate Amount button.
Calculate Amount:	Click to calculate.

When calculating a settlement figure for an existing customer, will it calculate even if the account is behind in payments?

Yes. It will not calculate if the asset has been utilised in more than one circumstance. If the customer has a loan with multiple assets the settlement figure will be for all assets. Early settlement fees are excluded and the settlement quote does not include any future payments.

Should a new settlement figure be calculated if a deal is delayed longer than a day?

Yes.

Why are some of the dates greyed out under my First repayment date field?

There is now flexibility with choosing the first repayment date. If the customer chooses either the Regular or Flexible payment types they are able to extend the date of their first repayment up until:

Frequency	Date range flexibility
WEEKLY	UP TO 6 DAYS
FORTNIGHTLY	UP TO 13 DAYS
MONTHLY	UP TO 2 MONTHS LESS 1 DAY

If a customer would like to extend past these dates, utilise the Flexible Payment function.

How do I add additional securities?

Enter asset details on the Security page and select Add Asset.   Add Asset

All assets will show under the Asset Details section at the bottom right of the page. Add additional securities by entering details and selecting Add Asset.

How do I enter details if the customer is purchasing 2 vehicles?

Enter the total price for both vehicles in the Purchase Price field. Add both of the vehicle details on the Security page by selecting Add Asset.

Are we required to submit details of the trade in vehicles?

Only the trade values. Details of the trade vehicle will be captured on the VOSA.

What format should I enter telephone numbers as?

Enter all digits together without spaces. The first 0 will drop off when the application is saved.

How do I add another applicant to a quote or application?

On the Application/Applicant page select Update. You then have the option to select Add Another Applicant to Application.

At what point does an application get re-submitted for review?
When the submit icon is selected.

Can I change or update an application after it has been reviewed?
Yes. If anything changes the application will need to be re-approved.

Can a quote be saved without an email address?
No. Anything marked with an asterisk is a mandatory field.

How many historical quotes will be saved?
All historical quotes and applications will be saved.

Where can I add extra comments?
The 'comments' field is at the end of the application, at the bottom of the Statement of Position screen under Assets and Liabilities. There are also comment boxes against each asset and liability.

I've deleted a quote/application by mistake – can I retrieve it?
Yes.

1.   On the search page select Advanced search by clicking on the magnifying glass icon at the top right of the screen.
2.   In the Sub Status drop down field select CANCELLED. Populate any further fields if needed, then select Search.
3.   Select the ID number of the quote/application you would like to retrieve.
4.   Select Edit.
5.   Save/edit/submit.