# Cars- Process Module:

1st module/Pre Sales: customer detail and pre sales.

 Connecting team (team profile):

1. Introducer
2. Tele caller/relational ship executive
3. Sales executive
4. Process executive
5. Team leader
6. Manager/branch
7. Regional manager

2nd module: process

Product – new or used

## New car details:

1. Manufacturer
2. Model
3. Variant
4. Fuel type
5. Color – 1st preference, 2nd preferences (give multiple choices)
6. Dealer City
7. Ex-showroom price
8. Dealer (multiple dealer)
9. Booking number
10. Booking date
11. Booking amount
12. Attach receipt
13. Excepted date of delivery
14. Revised date of delivery
15. Actual date of delivery
16. Manufacturer scheme
17. Dealer additional discount
18. Total discount
19. Discount to customer
20. Profit = total discount – discount to customer
21. Loan detail
    1. Loan required (checkbox)
       1. Finance by – self, dealer, advisorg
    2. HP To (ex ICICI)
    3. Loan amount
    4. Tenure
    5. ROI
    6. EMI
    7. No. of Advance EMI
    8. PF (processing fee)
    9. Disb. Amount = Loan amount – (EMI amount \* No. of advance EMI) - PF
22. Insurance:
    1. Insurance company
    2. Insurance type – third party, comprehensive, zero dep, zero dep consumable, zero deb RTI (dropdown with modification)
    3. Premium amount
    4. OD value
    5. Insurance start date
    6. Insurance end date
    7. Insurance reminder for renewal – (filter option to be provided)
23. Registration detail
    1. Registration amount
    2. Registration number
    3. Registration date
    4. Valid till
    5. Manufacturing Month/year
    6. Chassis number
    7. Engine number

## Used car details:

**Seller**

1. *Manufacturer*
2. *Model*
3. *Variant*
4. *Fuel type*
5. *Color*
6. *Owner serial number*
7. *Car Registration No*
8. *Purchase value*
9. *Refurbishment cost*
10. *Any other charges*
11. *Total Purchase Cost*
12. *Seller KYC*
13. *Purchase date*

**Buyer Detail:**

1. Model
2. Manufacturer
3. Variant
4. Fuel type
5. Color
6. Owner serial number
7. Car Registration No (Seller details should be linked)
8. Purchase value
9. Refurbishment cost
10. Any other charges
11. Total Purchase Cost
12. Seller KYC
13. Purchase date
14. Excepted date of delivery
15. Revised date of delivery
16. Actual date of delivery
17. Discount to customer
18. Selling price
19. Loan detail
    1. Loan required (checkbox)
    2. Finance by – self, dealer, advisorg
    3. HP To (ex ICICI)
    4. Loan amount
    5. Tenure
    6. ROI
    7. EMI
    8. Advance EMI
    9. PF (processing fee)
    10. Disb. Amount = Loan amount – (EMI amount \* No. of advance EMI) - PF
20. Insurance Detail:
    1. Insurance company
    2. Insurance type – third party, comprehensive, zero dep, zero dep consumable, zero deb RTI (dropdown with modification)
    3. Premium amount
    4. OD value
    5. Insurance start date
    6. Insurance end date
    7. Insurance reminder for renewal – (filter option to be provided)
21. Previous Insurance Detail:
    1. Insurance company
    2. Insurance type – third party, comprehensive, zero dep, zero dep consumable, zero deb RTI (dropdown with modification)
    3. Premium amount
    4. OD value
    5. Insurance start date
    6. Insurance end date
    7. Insurance reminder for renewal – (filter option to be provided)
    8. NCB percentage
22. Registration detail
    1. Registration amount
    2. Car Registration number
    3. Registration date
    4. Valid till
    5. Manufacturing year
    6. Chassis number
    7. Engine number
    8. RTO agent name
    9. Transfer doc given date
    10. RC receive date
    11. Transfer charges

Insurance Process

**Previous Insurance Detail:**

**Vehicle Detail**

1. Manufacturing year
2. Registration date
3. Chassis number
4. Engine number
5. Car Registration number
6. Owner Sr. No.

**Previous Insurance Detail:**

1. Insurance company
2. Insurance type – third party, comprehensive, zero dep, zero dep consumable, zero deb RTI (dropdown with modification)
3. Premium amount
4. OD value
5. Insurance start date
6. Insurance end date
7. Insurance reminder for renewal – (filter option to be provided)
8. NCB percentage
9. Any Claim

Insurance company

1. Insurance type – third party, comprehensive, zero dep, zero dep consumable, zero deb RTI (dropdown with modification)
2. Premium amount
3. OD value
4. Insurance start date
5. Insurance end date
6. Insurance reminder for renewal – (filter option to be provided)
7. Agency Code
8. Payout %
9. Payout Amount (OD Value x Payout %)
10. Disc to Customer
11. Net Payout= Payout Amount- Disc to customer

Accounting Module

1. Sourcing Person : Introducer/Sales/Agent/Direct (Provide modify option)
2. Commission%
3. Sales Incentive %:
4. Comm/Inc Amt: (OD Value x Comm %)+(Od Value x Inc%)
5. Payout %
6. Payout Amount (OD Value x Payout %)
7. Disc to Customer
8. Net Payout= Payout Amount- Disc to customer

**Loan Module Process**

1. Process Executive
2. Product: Secured Loan / Unsecured Loan
3. Sub-Product: Personal Loan/Business Loan/ SME/ Car/Home/LAP/LRD etc
4. Bank (multiple selection provide add button)
5. Loan Program
6. Loan Eligibility
7. Loan Applied
8. Current Status: Ex Dox recd/Pending Dox etc (Keep Hostory)
9. Login Code
10. Login Date
11. Approval Date
12. Post Login Date
13. Loan Approved
14. EMI Amt
15. No. of Adv EMI
16. Rate of Intt
17. Processing Fee
18. Insurance Charges
19. Other Charges (If Any)
20. Disbursal Amount = (Loan Amt-(EMI AMT x No. of Adv EMI)-Processing Fee-Insurance Charge- other Charges
21. Disbursal Date

**Commission / Incentive Sharing for all Products**

Value will be percentage/Amount Provide option accordingly

1. Referral Incentive
2. Sales Incentive (Direct Sales Team)
   1. Telesales
   2. Sales Executive
   3. Team Leader
   4. Manager
   5. Regional Manager
3. Commission (B2B)