



# Guide to APEX Sales Platform

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## Frequently Asked Questions


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**Useful Tip:** Hold Ctrl + F and use the search bar that appears to look for keywords relating to your query

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## System Access

### **I cannot log in, how do I reset my Password?**

*Please use the forgotten password link via ITC Website*

*<http://www.itccompliance.co.uk/?page=reminder>*

*If you do not receive a password reminder, please contact ITC Compliance Customer Service Team for support.*

### **I've moved from one site to another, how can I transfer my ITC User ID to the new site?**

*Please contact ITC Compliance Customer Service Team for support.*

### **I've moved from one company to another, can I transfer my ITC Training User ID to the new site?**

*Please contact ITC Compliance Customer Service Team for support.*

### **I can't access or transfer sales into the Consumer Credit System, can you help me?**

*Your site administrator or manager can provide you with access to the system, please contact your administrator, alternatively, please contact ITC Compliance Customer Service Team.*

## System Support

### **How do I create a sale for an existing customer? I'm getting the message; Do I wish to merge customers?**

*If the customer is known to your site, please select the customer profile found within the system - Refer to GDPR Guide.*

*[www.itccompliance.co.uk/apex/files/Apex\\_GDPR\\_Changes\\_Guide\\_v1.4a.pdf](http://www.itccompliance.co.uk/apex/files/Apex_GDPR_Changes_Guide_v1.4a.pdf)*

### **My Customer shares email &/or Telephone number with partner/wife, how do I overcome this problem?**

*Under GDPR, customers are required to provide unique contact information, for the purpose of entering into a regulated contract, shared contact details are not permitted. Alternative information should be obtained from the customer. If you need any help, please contact ITC Compliance Customer Service Team.*

### **How do I create a Joint Application on APEX?**

*APEX is designed for sole applications only; joint applications are not available.*

### **If my customer does not have a valid UK address, do I need to put them on the system?**

*If customers are not domiciled in the UK, they may be ineligible for regulated products, please annotate the deal file, there is no need to create a Demands & Needs or APEX Record.*

### **When creating sales, when should I select Commercial?**

*When creating sales for Sole Traders or Limited Companies, you must select Commercial. If 'Retail' is selected in error, a new sale will be required.*

### **I have made a mistake in the customer details; can this be corrected?**

*Customer Type, Title, Name, Surname & DOB can be amended by the Compliance Administrator via Customer admin. Once the customer record has been updated, a new sale will need to be created using the updated customer record.*

*If you require a minor change (e.g. Spelling Mistake, part way through a sale, this will need to be updated by contacting the ITC Compliance Customer Service Team.*



### **I am trying to complete a sale, however, there are Products are missing from the sale, can you add this in for me?**

*If the Product Suitability Questions have been completed, but the product has not been considered, you will have an option to 'Add GI Products' at the top of the page.*

*It is not possible to add 'missing' GI products onto APEX sales, if GAP or SMART have not been selected for discussion, a new sale will be required.*

### **I have started a sale & my Customer has decided to fund the purchase via Dealer Finance, can you add this in for me?**

*There is an option to 'Add Finance Products' at the top of the page, this will give you the option to change how the vehicle is being funded.*

*If you experience any difficulty, please contact the ITC Compliance Customer Service Team.*

### **How can I change the vehicle price on this sale?**

*The price of the vehicle can be updated at the Product Selection step, this will ensure that the correct policy level can be selected for consideration.*

*If the price needs to be amended at the APPLY step, you will need to contact ITC Compliance for support. If the price amendment falls within the policy level, this can be completed. If it falls outside (and no longer meets the criteria of the policy level) a NEW sale will be required.*

### **How do I update the vehicle registration number, it is locked at Apply?**

*If you cannot amend within the Apply Step, this is due to confirming the registration number earlier in the sale, please contact ITC Compliance Customer Service Team.*

### **I've input the wrong Vehicle mileage; how do I amend it during the sales process?**

*Please contact ITC Compliance Customer Service Team for support.*



### **My customer has change address/email/mobile number, how can I update this?**

*Customer contact information can be updated at customer details or at the apply step, via Edit Customer Record. Please ensure that this is updated prior to completion of the sale and any associated products.*

### **When attempting to complete a sale, I'm getting a 'Webservice' error, could not communicate with the supplier, why is this happening?**

*This message is usually returned where we are not receiving a response from the Product Provider, please try again. If problems persist, please contact ITC Compliance Customer Service Team.*

### **How do I delete a sale?**

*Please contact ITC Compliance Customer Service Team for Support.*

### **I've uploaded the wrong finance document or vehicle invoice; how can I change it?**

*Please upload the correct document, this will replace the incorrect upload.*

### **When attempting to complete the sale, the Demands and Needs will not generate, can you help me?**

*The product provider will undertake validation of customer data (Address, Telephone, Email), one or more data fields are missing. Select Edit Customer Record & update the customer information, select update customer, this will resolve the problem.*



### **How can I change/update the Insurance Policy Duration?**

*It may be necessary to re-key the sale, please contact ITC Compliance Customer Service Team for Support.*

## **Training Support**

### **I need to complete my training, where do I access my training material?**

*Please log into APEX and select My Training from the control panel, update your CV/Profile and complete the course.*

### **How can I see my team training?**

*Please log into APEX and select My Training from the Control Panel, then select the Reports option, this will allow you to view staff training & access staff action plans.*

*For further guidance, please contact ITC Compliance Customer Service Team.*





Thank you for taking the time to read this  
guide/FAQ.

If you cannot find the answer you require,  
please call ITC Compliance on;

**0845 177 22 66.**