

Contents

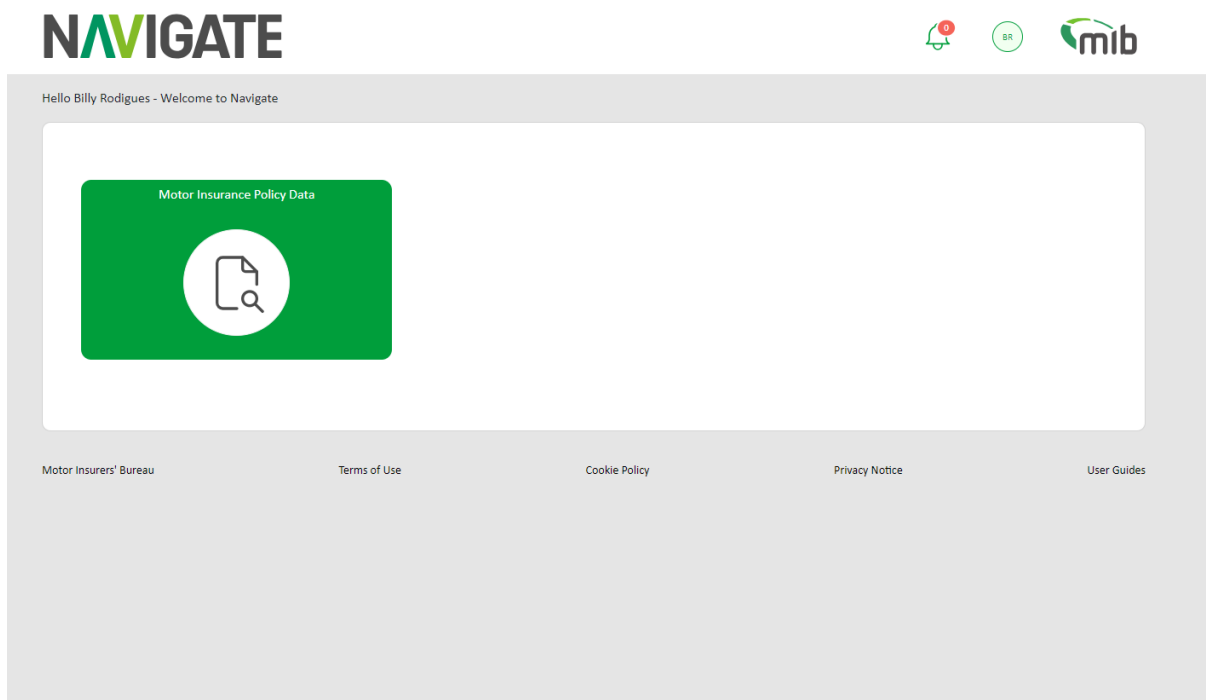
1 Standard File Transfer (SFT).....	2
1.1 Log in to the Navigate Portal	2
1.2 Click on the Motor Insurance Policy Data tile	2
1.3 Motor Insurance Policy Data will be available	2
1.4 Click on the File Transfer tile.....	3
1.5 Populate the required fields in the separate CSV file attached to the email with your policy records.	4
1.6 Once the file has been populated you will need to delete the headings in row 1 leaving only the data records	5
1.7 Save the file	6
1.8 Click on Choose File in Navigate	6
1.9 Click on the file pop up to select your file	7
1.10 Click on Submit.....	7
Additional Information regarding updating vehicle schedules using Standard File Transfer	10

1 Standard File Transfer (SFT)

The standard file transfer functionality allows you to add and amend vehicles against your policies using an excel sheet formatted as a CSV file. The fields that you will populate replicate the fields you would use when adding via the Navigate Portal interface. There are some additional fields which will be within the sheet which are explained within this document.

1.1 Log in to the Navigate Portal

1.2 Click on the Motor Insurance Policy Data tile



1.3 Motor Insurance Policy Data will be available

Home / Motor Insurance Policy Data / Select a Policy

Update Vehicle

Select a Policy

You must fill in the box marked*

Policy Number*

VRM

Policy Start Date

[Submit](#)

SEARCH RESULT

2 policies are assigned to **Billy Rodrigues**

Policy Number	Policy Start Date	Policy End Date	Insurer/DA Name	Insurer Helpdesk Contact Details
CVTTESPOL1C30	09/04/2024	09/02/2025	MIICTEST517	Insurer Helpdesk Contact Details
CVTTESPOL1	13/02/2024	09/02/2025	MIICTEST517	Insurer Helpdesk Contact Details

Displaying Results 1 to 2 of 2

Show: 10 Rows

1.4 Click on the File Transfer tile

Insurer ID: 517 - Insurer Name: MIICTEST517

Home / Motor Insurance Policy Data / File Transfer

Update Vehicle

Request a File Transfer

Select the file you want to transfer and click Submit. The file details must be entered in the corresponding File Template document and saved in .csv format.

Transfer Type: [Download Standard File Template](#)

File Name: [Browse](#) [Submit](#)

2 Requests have been submitted between [Refresh](#)

File Request ID: [Find](#) **Show Status:** Show All

Date/Time File Uploaded	File Request ID	Record Count	Date Results File Created	File Upload Method	File Upload Status
12/05/2024 16:04:12	2024133000002	1	12/05/2024 16:07:33	Attended/SFTP	COMPLETE
12/05/2024 16:16:32	2024133000003	1	12/05/2024 16:19:48	Attended/SFTP	COMPLETE

Displaying Results 1 to 2 of 2

Show: 10 Rows

1.5 Populate the required fields in the separate CSV file attached to the email with your policy records.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
Record Ty	Update Ty	Insurer ID	Insurer Bri	Quotebacl	Delegated	DA Branch	Policy Nun	Foreign Re	VRM	Trade Plat	Vehicle Ty	Vehicle M	Vehicle M	Vehicle De	Vehicle En	Number o	Gross Veh	Vehicle Ins	Vehicle Or	Vehicle Off	Date
V	e.g. N or A	e.g. 123					POLICY1	U		U										20240509	20250108


Replace the placeholder example values (columns A, B, C, H, I, J, K, T, and U) with your vehicle data.

Column A


- Record Type (this will always be **V** for vehicle records)

Column B

- Update Type

- N (New)**– used when adding new vehicles to the policy  (how it appears in the portal)

- A (Amend)** – used when you are updating any of the vehicle details listed

against the policy  (how it appears in the portal)

○ D or O (Delete)

- D should be used when you want to remove an incorrect vehicle record, or records from the Policy. At least one record on the policy for that VRM must be found in the CSV, where the On and Off dates match exactly. The system will then delete all instances of that VRM from the policy (including any future dated records that have not come in force)
 - O should be used where you want to delete a single vehicle record only. In this instance at least one record must be found where the On and Off dates listed within the CSV match exactly with the record other wise the update will be rejected.

Column C

- You will need your Insurer ID example below

NAVIGATE

Insurer ID: 517 - Insurer Name: MIICTEST517

Column H

- Policy number - **must** be included for every single record

Column I

- The Foreign Registration Indicator must always be U

Column J

- VRM (Vehicle Registration Mark/Number)

Column K

- Trade Plate Indicator (this must always be populated – either with:
 - T for a Trade Plate, or
 - U for a standard UK registration

Column T

- Vehicle On-date as YYYYMMDD

Column U

- Vehicle Off-date as YYYYMMDD

As per example below:

	T	U
Vehicle On Date	Vehicle Off Date	
20240509	20250108	

It is recommended that the other fields are also completed: (Columns L – R)

- Vehicle Type (e.g. car, van)
- Vehicle Make (e.g. Ford, Hyundai)
- Vehicle Model (e.g. Astra, i30)
- Vehicle Derivative (e.g. GLS)
- Vehicle Engine Size (e.g. 1400)
- Number of Seats (for buses and minibuses)
- Gross Vehicle Weight (for HGVs)

1.6 Once the file has been populated you will need to **delete** the headings in row 1 leaving only the data records

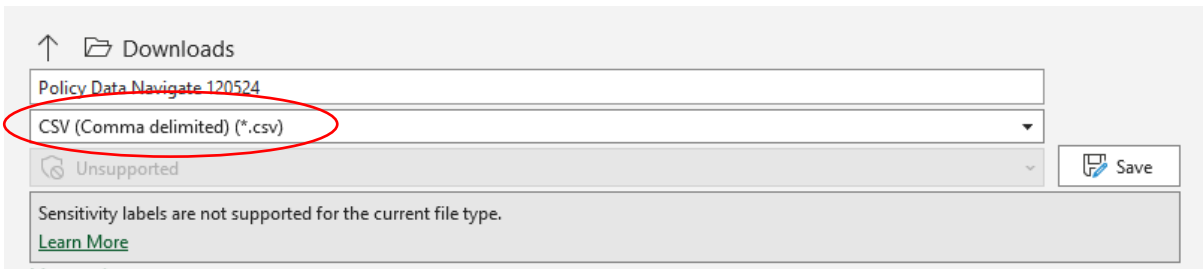
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V		
1	Record Ty	Update Ty	Insurer ID	Insurer Bri	Quotebac	Delegated	DA Branch	Policy Nur	Foreign Re	VRM	Trade Plat	Vehicle Ty	Vehicle M	Vehicle M	Vehicle De	Vehicle En	Number o	Gross Veh	Vehicle Ins	Vehicle Or	Vehicle Off	Date	
2	V	e.g. N or A	e.g. 123				POLICY1	U		U											20240509	20250108	
3																							
4																							
5																							

As per example below:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1	V	N	517					XL/898934	U	LG69OYT	U	BMW	3 series	330						20240509	20250108
2	V	N	517					XL/898934	U	LG71VYT	U	BMW	4 series	430						20240509	20250108

1.7 Save the file

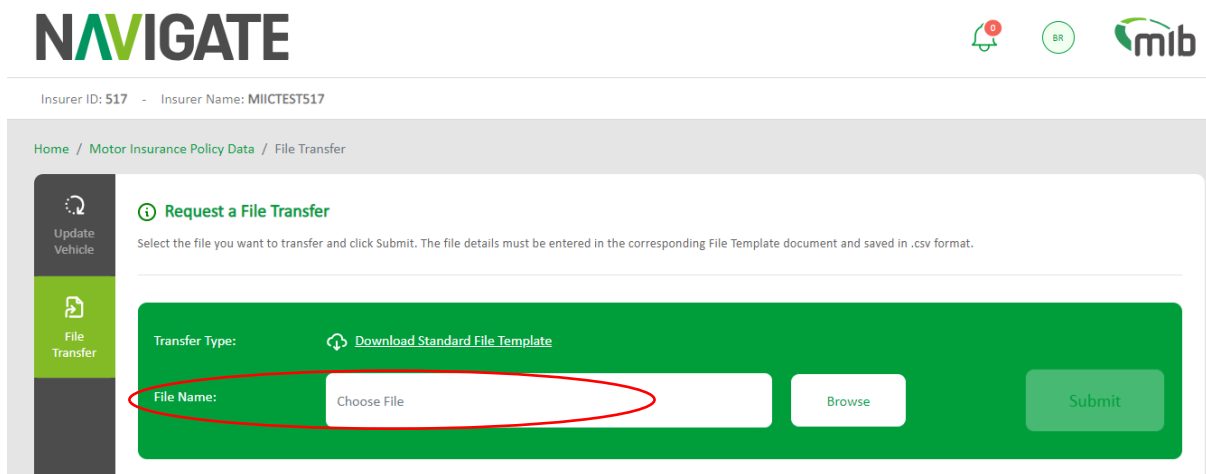
When the fields have been completed, select File **Save As**. Name the file (a sequence you're familiar with) and make sure the file is saved as a **CSV (.csv)** ready for uploading to the database.





Note when you close the workbook, you **might** be asked if you want to save the changes made to "Standard File Template.xls?", you do not need to save the file again when closing, but if you want to keep a copy of the data or re-use the data at a later date, it is recommended that the file is saved as an Excel Workbook (.xls) so that it can be easily opened and viewed. To do this, change the file name (so that the downloaded "empty" standard template is not saved with data in it) and select "Save" to save the workbook.

1.8 Click on Choose File in Navigate

This will allow you to search for your saved CSV file

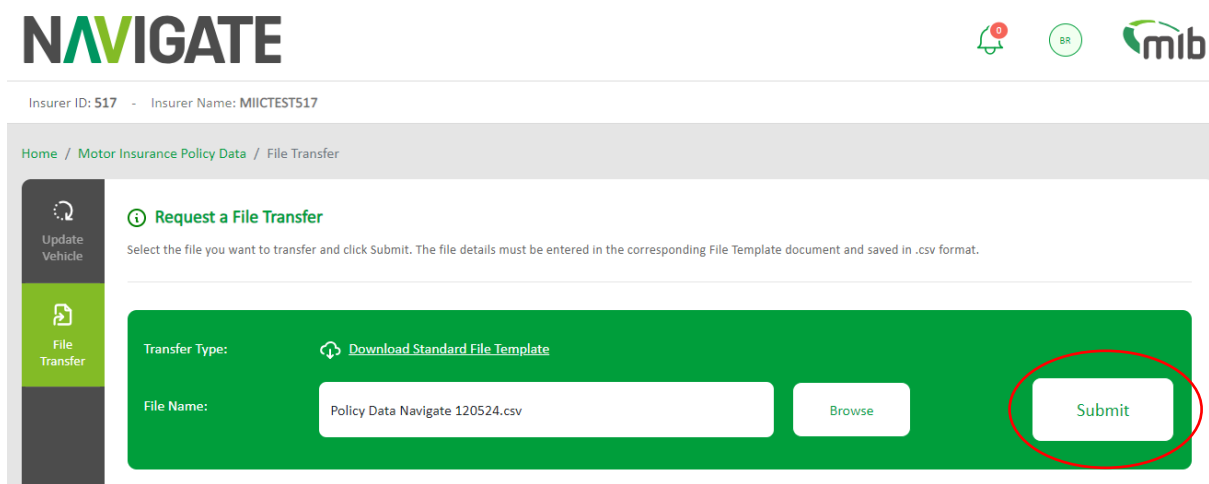


1.9 Click on the file pop up to select your file

Name	Status	Date modified	Type
 Policy Data Navigate 120524	 R	12/05/2024 18:32	Microsoft Excel Com...

Select file.

1.10 Click on Submit



The screenshot shows the NAVIGATE portal interface. At the top, there's a header with the NAVIGATE logo and user information: Insurer ID: 517, Insurer Name: MIICTEST517. Below the header, there's a navigation bar with 'Home / Motor Insurance Policy Data / File Transfer'. On the left, there's a sidebar with 'Update Vehicle' and 'File Transfer' options. The main content area is titled 'Request a File Transfer' and includes instructions: 'Select the file you want to transfer and click Submit. The file details must be entered in the corresponding File Template document and saved in .csv format.' Below this, there's a form with 'Transfer Type' set to 'Download Standard File Template'. The 'File Name' field contains 'Policy Data Navigate 120524.csv'. There are 'Browse' and 'Submit' buttons. The 'Submit' button is circled in red.

When a file is successfully submitted, a “Results File” email is sent, showing the File Request ID assigned. Where the file format is not correct and cannot be processed, a “Results File” email is sent to advise this is the case.

A Results File for successful load will show “THIS FILE HAS BEEN SUCCESSFULLY LOADED”

	A	B	C	D	E
1	X	THIS FILE HAS BEEN SUCCESSFULLY LOADED			

A Results File with errors and warnings will provide the error and warning codes.

	A	B	C	D	E	F	G	H	I	J
1	X	ROLYDA002			A11GYM	20230622		20231730	V	E088

It is important that the errors and warnings are acted upon to ensure the vehicle is on **Navigate** and the data is correct.

The results file is also visible within the Navigate Portal, as per the below.

Update Vehicle

File Transfer

Request a File Transfer

Select the file you want to transfer and click Submit. The file details must be entered in the corresponding File Template document and saved in .csv format.

Transfer Type: [Download Standard File Template](#)

File Name:

2 Requests have been submitted between

File Request ID: Show Status:

Date/Time File Uploaded	File Request ID	Record Count	Date Results File Created	File Upload Method	File Upload Status
12/05/2024 16:04:12	2024133000002	1	12/05/2024 16:07:53	Attended/SFTP	COMPLETE
12/05/2024 16:16:32	2024133000003	1	12/05/2024 16:19:48	Attended/SFTP	COMPLETE

Displaying Results 1 to 2 of 2

< 1 >

Show:

Clicking on the File Request ID for visibility of the success of the file transfer, if the file has been rejected it will display as per the below with an error code.

Update Vehicle

File Transfer

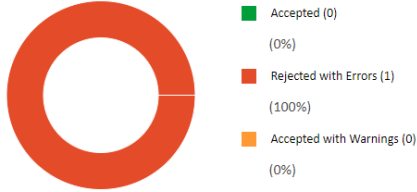
File Request ID 2024133000002

Export Result File

Back to File Transfer

FILE SUMMARY

No. of records in file : 1



FILE DETAILS

File Status:	Accepted with Errors	Last Status Changed:	C99 To H10
File Received on Server:	12/05/2024 16:04:12	Change Made On:	12/05/2024 16:07:47
File Transfer Began:	12/05/2024 16:07:15	Updated By:	52
File Transfer Completed:	12/05/2024 16:07:15	Sent to Database:	12/05/2024 16:07:15

TOP 5 ERRORS

Code	Status	No.
E089	Vehicle On/Off dates not within Policy Effective/Expiry dates	1

TOP 5 WARNINGS

Code	Status	No.
No data available in this table		

If you have any questions about this file or are experiencing difficulties, please contact your Insurer [MIB Helpdesk](#)

A successful file upload example below.

Update Vehicle

File Transfer

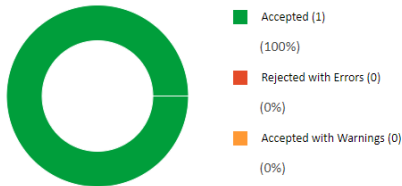
File Request ID 2024133000003

Export Result File

Back to File Transfer

FILE SUMMARY

No. of records in file : 1



FILE DETAILS

File Status:	Accepted	Last Status Changed:	D99 To H10
File Received on Server:	12/05/2024 16:16:32	Change Made On:	12/05/2024 16:21:28
File Transfer Began:	12/05/2024 16:18:31	Updated By:	52
File Transfer Completed:	12/05/2024 16:18:31	Sent to Database:	12/05/2024 16:18:31

TOP 5 ERRORS

Code	Status	No.
No data available in this table		

TOP 5 WARNINGS

Code	Status	No.
No data available in this table		

If you have any questions about this file or are experiencing difficulties, please contact your Insurer [MIB Helpdesk](#)

Example of how the fields map between the Add/Update vehicle screen and SFT CSV file transfer upload

The screenshot shows the 'Add Vehicle' screen in the NAVIGATE system. The header includes the NAVIGATE logo, a notification bell, a 'BR' button, and the MIT logo. Below the header, the user's insurer information is displayed: 'Insurer ID: 517 - Insurer Name: MIICTEST517'. The breadcrumb trail reads: 'Home / Motor Insurance Policy Data / Select a Policy / Search Result / Add Vehicle'. The main content area is titled 'Add Vehicle' and includes a 'Back to Policy' button. A green box displays policy information: 'Policy No : CVTTESPOL1C30' (labeled 'Policy Number'), 'Previous Policy Start Date : 09/10/2023', 'Previous Policy Expiry Date : 13/02/2024', 'Current Policy Start Date : 09/04/2024', 'Current Policy Expiry Date : 09/02/2025', and 'Future Policy Start Date :' and 'Future Policy Expiry Date :'. Below this, there are two sections for vehicle registration and cover dates. The first section shows 'Vehicle Registration *' as 'VRM' and 'Trade Plate' as 'Trade Plate Indicator'. The second section shows 'Vehicle On Cover Date *' as '11/05/2024' (labeled 'Vehicle On Date') and 'Vehicle Off Cover Date *' as '09/02/2025' (labeled 'Vehicle Off Date'). The 'VEHICLE DETAILS' section includes fields for 'Vehicle Type' (a dropdown menu), 'Vehicle Make', 'Vehicle Model', 'Derivative', 'Vehicle Engine Size', 'Number of Seats', and 'Gross Vehicle Weight'. A green 'Submit' button is located at the bottom right of the form.

Additional Information regarding updating vehicle schedules using Standard File Transfer

For SFT files, only new vehicles or amended information i.e. vehicle off cover date should be uploaded. It is not necessary to include all details of vehicles in your fleet as this could lead to incorrect information on to Navigate.

A NEW record must be uploaded when a vehicle enters the fleet and is not on Navigate.

A NEW record should also be uploaded when further periods of cover for the same vehicle occur.

An AMEND record type must be uploaded when a vehicle leaves the fleet and the record on Navigate requires the off-cover date to be changed.

A DELETE record should only be used when you need to remove records that have been added in error.

Further details on updating the database using SFT can be found in Appendix B below.

Guidance for updating the vehicle schedules via Standard File Transfer (SFT)

Correcting incorrect vehicle cover dates

If there is a record on Navigate with incorrect cover dates (this can be the on or off date or both) then you will need to delete the record and replace it with a New record with the correct cover dates. Please note this is not the method used when simply taking a vehicle off cover as only an Amend record is required with the new off cover date. Extending vehicle cover dates: If there is a record with an off-cover date that needs to be extended then you will need to submit a further New record with on cover and off cover dates for the extended period. Please note in this scenario the on date in the record should not be the date the of the original record loaded to Navigate but the start date of the extended period.

Changing vehicle details

Where vehicle details change partway through the cover period (i.e. the engine size increases) and this change needs to be reflected on Navigate then you will need to submit an amend record with an off cover date of when the change took place and an off cover date that matches the existing record.