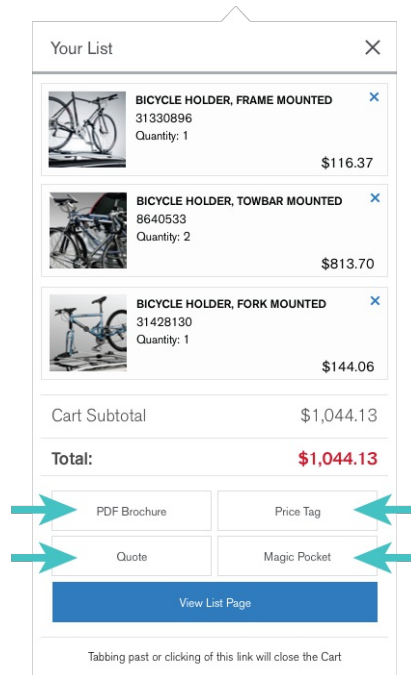


How to Create Quote

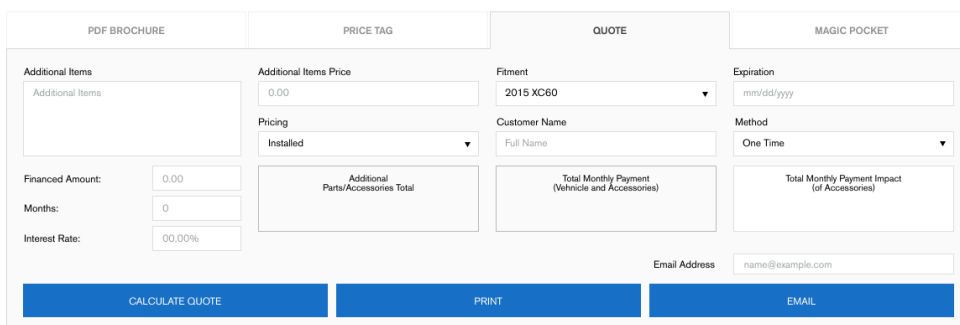
Last Modified on 09/01/2020 2:29 pm EDT

Within the B2B platform, you can generate a custom quote and calculate financing for items in a selected list and then print or email the customer a copy.

After you've created a list on the B2B platform, you can access the Quote fields by clicking on the List & Print Options button in the list widget.



On the list page there are four tabs; click on the third one (titled Quote). This is what it should look like:



The screenshot shows the 'QUOTE' tab selected in a four-tab interface. The form contains the following fields and sections:

- Additional Items:** A text box for 'Additional Items' and a 'Pricing' dropdown menu set to 'Installed'.
- Additional Items Price:** A text box containing '0.00'.
- Fitment:** A dropdown menu set to '2015 XC60'.
- Customer Name:** A text box with 'Full Name' as a placeholder.
- Expiration:** A text box with 'mm/dd/yyyy' as a placeholder.
- Method:** A dropdown menu set to 'One Time'.
- Financed Amount:** A text box containing '0.00'.
- Months:** A text box containing '0'.
- Interest Rate:** A text box containing '00.00%'.
- Summary Boxes:** Three boxes for 'Additional Parts/Accessories Total', 'Total Monthly Payment (Vehicle and Accessories)', and 'Total Monthly Payment Impact (of Accessories)'.
- Email Address:** A text box containing 'name@example.com'.

At the bottom, there are three blue buttons: 'CALCULATE QUOTE', 'PRINT', and 'EMAIL'.

The Quote page contains multiple fields you can use to further customize a customer's quote:

1. **Additional Items.** By entering a description in the Additional Items box and the price in the Additional Items Price box, you can add any special, non-cataloged items to the quote.
2. **Fitment.** Enter a specific Fitment, if it's relevant to the quote.

3. **Expiration.** Set an Expiration date, in case prices for items change.
4. **Pricing.** There are five options for Pricing: MSRP, MSRP + Installation, Online Price, Online Price Installed, or Our Price.
5. **Customer Name.** Add the Customer's Name
6. **Method.** Select the payment Method (currently, One Time is the only option available)

PDF BROCHURE	PRICE TAG	QUOTE	MAGIC POCKET
Additional Items 1 Additional Items	Additional Items Price <input type="text" value="0.00"/> Pricing 4 <input type="text" value="Installed"/>	Fitment 2 <input type="text" value="2015 XC60"/> Customer Name 5 <input type="text" value="Full Name"/>	Expiration 3 <input type="text" value="mm/dd/yyyy"/> Method 6 <input type="text" value="One Time"/>

If you'd like to calculate financing for the customer, enter the corresponding values into the Financed Amount, Months and Interest Rate fields before clicking the Calculate Quote button. This will update the Total, Monthly Payment, and Impact fields.

Financed Amount: <input type="text" value="0.00"/> Months: <input type="text" value="0"/> Interest Rate: <input type="text" value="00.00%"/>	Additional Parts/Accessories Total <input type="text"/>	Total Monthly Payment (Vehicle and Accessories) <input type="text"/>	Total Monthly Payment Impact (of Accessories) <input type="text"/>
Calculate Quote (indicated by a green arrow)			PRINT
Email Address <input type="text" value="name@example.com"/>			
EMAIL			

After you've completed the Quote fields and calculated any totals (if necessary), print the quote by clicking on the Print button or email it by entering a valid email address and hitting the Email button.

Each Quote will display:

- Dealership name and location information
- Customer name
- Creation date
- Expiration date
- Vehicle fitment
- Quote ID
- Product details
- Financing
- Totals

Mark Mustermann Volvo

Accessory Quote



1234 Street Suite B, City, State 00000 000.000.0000 parts@dealershipnameforemipsum.com www.markmustermannvolvo.com

Customer Name Mark Mustermann
Created 11.16.17
Vehicle 2017 Volvo V90
Quote ID 0000

Product Details	Quantity	Our Price
Ramp. Bicycle holder, towbar mounted, 2 bicycles - An extremely compact bicycle holder with patented design for two bicycles, and which is easy to handle and store.... Part Number: 8641096	1	\$ 57.23
Head cushion. Comfort pillow - The Volvo padded neck cushion fills the area behind head or shoulders and provides a comfortable support for the neck....Part Number: 8698043	1	\$ 105.00
Voltage converter. Cooler/heater box - A practical, portable cooler/heater box that keeps food cold or hot on trips. The box is placed in the load compartment....Part Number: 9481788	1	\$ 74.81
Protection. Bumper cover - An exclusive styling element made of stainless steel with a high gloss finish. Protects the bumper from scratches when loading and unloading.... - Part Number: 31439240	1	\$ 100.68
	Parts and Accessories	\$ 337.72
	Down Payment	\$ 0.00
	Total Due	\$ 77,037.72

Quote does not include applicable item or labor tax. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis tempus, sapien eu tempor tincidunt.

If financed with auto payment, this quote helps you estimate your monthly payments for illustrative purposes only. Actual pricing and terms or any finance or lease transaction must be agreed upon by you and your dealer. dealer sets actual prices.

Parts and Accessories Total	Total Monthly Payment (Accessories and Car)	Payment Impact (of Accessories)
\$ 337.72	\$ 1,080.75	\$ 15.43

Payment impact price is based on the following information provided at the time this was created

Financed Amount (Accessories and Car)	\$ 77,037.72
Months	72
Interest Rate	0%