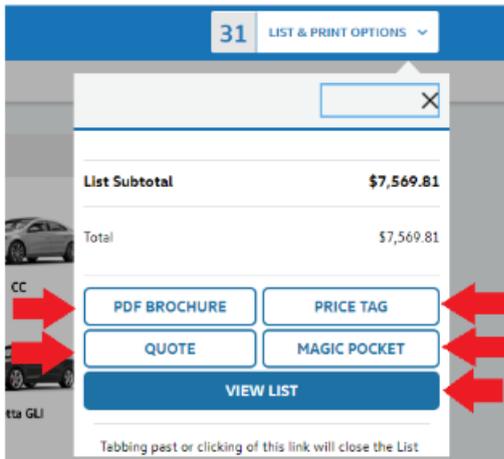


# How to Create a Quote

Last Modified on 09/01/2020 2:20 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 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)

The screenshot shows a quote form with the following fields and callouts:

- 1. Additional Items: Swag
- 2. Additional Items Price: 9.99
- 3. Fitment: 2012 RS3
- 4. Expiration: 06/01/2018
- 5. Pricing: MSRP
- 6. Customer Name: John Jones
- 7. Method: 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.

The screenshot shows a financing calculation summary with the following data:

FINANCED AMOUNT:	678.67	Additional Parts/Accessories Total	\$688.66	Total Monthly Payment (Vehicle And Accessories)	\$456.16	Total Monthly Payment Impact (of Accessories)	\$229.74
MONTHS:	3						
INTEREST RATE:	5						

Buttons: CALCULATE QUOTE, PRINT, EMAIL

Email Address: name@example.com

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



Volkswagen

### Reydel Volkswagen

Accessory Quote

PO Box 853, 2034 Highway 27, NJ, 08018 (732) 207-2028 [parts@reydelvw.com](mailto:parts@reydelvw.com) [parts.reydelvw.com](http://parts.reydelvw.com)

Customer Name John Jones  
 Created 05/25/18  
 Expires 09/09/2018  
 Vehicle 2016 Beetle  
 Quote ID 3902

Product Details	Quantity	MSRP
Roof rack, Convertible Top Storage Compartment Ltd. - Reig Part Number: 1V07 041079	1	\$679.67

	Additional Item Price Part and Accessory	99.99 \$688.66
<b>Parts and Accessories Total</b>	<b>Total Due</b>	<b>\$12,688.66</b>
<b>\$688.66</b>	<b>Total Monthly Payment</b> Parts, Accessories and Vehicle	<b>\$38.71</b>
	<b>Payment Impact</b> (of Parts, and Accessories)	

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

<b>Financed Amount</b> (Accessories and Vehicle)	\$12,688.66
<b>Months</b>	18
<b>Interest Rate</b>	1.5