



QuickPrint

What is it?

QuickPrint enables users to quickly email or print a proposal. The QuickPrint system is highly customizable and offers several templates to meet the dealer's expectations for proposal presentations. Users will have the ability to email or print the proposals and each email or print is logged to the Notes & History of the Customer Dashboard as well as the Desking Management Report within Desking.

QuickPencil

What is it?

QuickPencil is a salesperson presentation tool that empowers the salesperson to provide an on-screen quote to a customer without ever having to leave the customer. QuickPencil is enabled by a toggle within the Desk in Desking then viewed from the same icon on the Customer Dashboard. Salespeople without access to Desking are unable to alter or change the deal.

QuickPrint

Setting up your default QuickPrint

To access the **QuickPrint** settings, click on the grey cog wheel  next to the Preview button on any deal. *Please note: This button is only available to admin level users*

Summary 1 L24		Is Primary			1	
MSRP	27075		Preview		L 24	
Selling Price	27075		D1	%	1000	659.16
Add'l Cap. Items	+ 1,947.08		% D2	%	2000	613.50
Sub Total	= 29,022.08		D3	%	3000	567.84
Total Taxes	+ 0				Rate	0.0022 MF
Gross Cap Cost	= 29,022.08					
Cap Cost Reduction	- 1,000					
Adjusted Cap Cost	= 28,022.08					



The **QuickPrint** Presentation Settings screen will open. From here you can Add, Copy, Remove, or Edit Default Proposals.

Presentations Settings			Edit Defaults	Add Proposal
Proposal	Template	Type		
Legacy Quick Print	Legacy-Quick-Print	QuickPrint Primary	⋮	
QuickPencil-Multi-Scenario-WithOut-Vehicle-Image	QuickPencil-Multi-Scenario-WithOut-Vehicle-Image	QuickPencil		ⓘ
Multi-Scenario-With-Vehicle-Image	Multi-Scenario-With-Vehicle-Image	QuickPrint	⋮	
Single-Scenario-With-Vehicle-Image-LongDetails	Single-Scenario-With-Vehicle-Image-LongDetails	QuickPrint	⋮	

Button	What it Does
	<p>“Edit Defaults” allows you to select what information you would like to show or not show the customer. You can customize the default names of the proposals itemizations, add optional payment ranges, upload logo, and general settings. When a new proposal is added, the configuration from Edit Defaults is used on the added proposal.</p>
	<p>“Add Proposal” will allow you to create a new Proposal by selecting a template and inputting a proposal name. You can then make changes to the newly added proposal by clicking on the Name of the proposal from the list of proposals in Presentation Settings.</p>
<p>⋮</p> 	<p>By clicking on the “...” button in line with a given Proposal, a menu will appear allowing you to Set as Primary, Copy or Remove.</p> <p>Set Primary determines which proposal template will display when using Preview from Desking.</p> <p>Copy Proposal creates an exact replica of the proposal template and configuration you copied.</p>
<p>1st Pencil – Long Details</p>	<p>By clicking on the name of the proposal from Presentation Settings, users can edit the given proposal template.</p>



Previewing Your Proposal

To **Print** or **Email** your Proposal, make sure the deal you want to present is configured as the Primary Deal then click on the **Preview** button from within the deal.

The **QuickPrint** Preview screen will open. From here you can preview your proposal before **Printing** or **Emailing**.

QuickPrint

2018 Ford Escape Print Email

Preview

Date/Time: Jul 1, 2019 10:09 AM

Buyer: [Redacted]

CoBuyer: [Redacted]

Phone: [Redacted]

Address: [Redacted]

Trade: 2011 Chevrolet HHR, SUV (110,000)

1999 Nissan Sentra, Coupe (189,000)

Salesperson: Brandi Leak

Salesperson: Aaron Brown

2018 Ford Escape, Body Type: SUV 4070

Color: Lightning Blue Metallic, 5 Miles VIN: 1FMCU9HD2JUA04070

Lease	24 Monthly @	36 Monthly @ 0.00375	39 Monthly @	MSRP/Retail	
\$ Down	Est. \$/Monthly	Est. \$/Monthly	Est. \$/Monthly	Selling Price	
\$1,000	\$562	\$390	\$465	Rebate	\$1,000.00
\$2,000	\$514	\$355	\$435	Government Fee	\$105.00
				Proc/Doc Fee	\$0.00



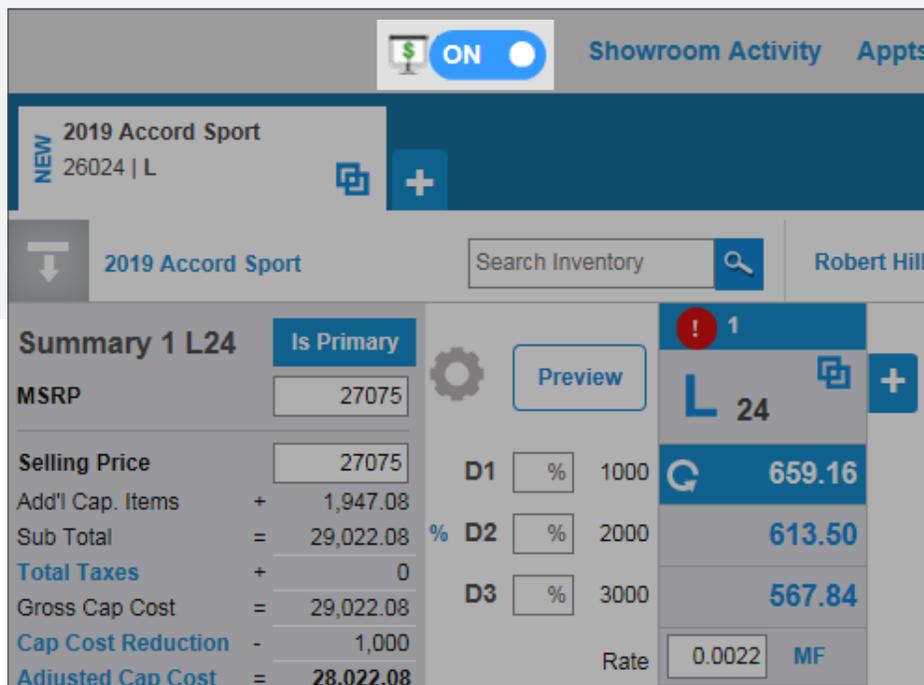
Button	What it Means
	Prints the below proposal as-is for customers present in the showroom. <i>Please note: All proposals printed are logged to the Notes & History of the Customer Dashboard for the given lead. Additionally, the printed proposals log to the Desking Management Report in Desking as well.</i>
	Allows you to Email the below proposal to the customer as a PDF attachment. Ideal for customers working deals over the Internet or Phone. <i>Please note: All proposals printed are logged to the Notes & History of the Customer Dashboard for the given lead. Additionally, the printed proposals log to the Desking Management Report in Desking as well.</i>

QuickPencil

Enabling the QuickPencil for the salesperson

Dealers who want to go paperless or reduce the amount of time it takes to deliver a pencil to a customer on the Showroom will benefit from **QuickPencil**. With a click of a toggle from the Desk Manager, the proposal will immediately be accessible from the Customer Dashboard for the salesperson to present.

Once the deal has been desked, ensure the deal to present is set as the Primary Scenario then click on the **QuickPencil** toggle at the top to enable it from the Customer Dashboard for the salesperson.



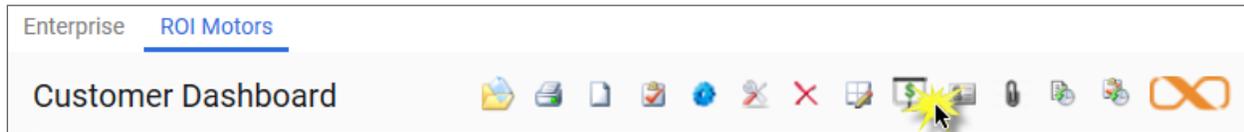
The screenshot shows a software interface for a car configuration. At the top, there is a 'QuickPencil' toggle switch set to 'ON'. Below this, the car model '2019 Accord Sport' is displayed. A 'Summary 1 L24' section shows a list of items and their costs: MSRP (27075), Selling Price (27075), Add'l Cap. Items (+ 1,947.08), Sub Total (= 29,022.08), Total Taxes (+ 0), Gross Cap Cost (= 29,022.08), Cap Cost Reduction (- 1,000), and Adjusted Cap Cost (= 28,022.08). To the right of the summary, there are three dropdown menus labeled 'D1', 'D2', and 'D3', each with a percentage input field and a value (1000, 2000, 3000). Below these is a 'Rate' field with the value '0.0022' and 'MF'. On the far right, there is a 'Preview' button and a 'QuickPencil' icon with a red notification bubble containing the number '1'.



Button	What it Means
	QuickPencil is ON and the proposal will be accessible from the Customer Dashboard.
	QuickPencil is OFF and the proposal can only be accessible and printed from the Desking system.

Note: Only those with the correct permissions to desk a deal will be able to toggle.

To access the proposal from the Customer Dashboard click on the icon of the desked customer's dashboard.



A preview screen will open allowing the user to review the on-screen pencil of the deal enabled by the desk manager.

Stock # 4070
2018 Ford Escape, SUV
Lightning Blue Metallic, 5 Miles VIN:1FMCU9HD2JUA04070

Lease		Trade-In: 2011 Chevrolet HHR, SUV, 110,000 Miles Payoff: N/A	
\$1,000 Out Of Pocket	\$562 (Monthly) 24 Month Lease 9% 12,000 mi/yr	\$390 (Monthly) 36 Month Lease 0.00375 0 mi/yr	\$465 (Monthly) 39 Month Lease 8.4% 10,500 mi/yr
\$2,000 Out Of Pocket	\$514 (Monthly) 24 Month Lease 9% 12,000 mi/yr	\$355 (Monthly) 36 Month Lease 0.00375 0 mi/yr	\$435 (Monthly) 39 Month Lease 8.4% 10,500 mi/yr
\$5,000 Out Of Pocket	\$372 (Monthly) 24 Month Lease 9% 12,000 mi/yr	\$251 (Monthly) 36 Month Lease 0.00375 0 mi/yr	\$346 (Monthly) 39 Month Lease 8.4% 10,500 mi/yr
Purchase		Trade-In: 1989 Nissan Sentra, Coupe, 189,000 Miles Payoff: \$500	
\$1,000 Cash Down	\$683 (Monthly) 48 Month Purchase 9%	\$683 (Monthly) 48 Month Purchase 9%	
\$2,000 Cash Down	\$659 (Monthly) 48 Month Purchase	\$659 (Monthly) 48 Month Purchase	

New Avg Fuel Economy:	28
Trade Avg Fuel Economy:	20
Avg Monthly Savings:	\$62
Total Trade Allowance:	\$11,000
Total Trade Adjustments:	\$1,500
Net Trade Allowance:	\$9,500

MSRP/Retail	\$36,000.00
Total Savings	\$3,665.00
Selling Price	\$32,335.00
Aftermarket Rims	\$120.00
Underglow Kit	\$299.00
Free Car Wash	\$0.00
Government Fee	\$105.00
Acq. Fee	\$645.00
Gross Cap Cost	\$35,666.00
Cap Cost Reduction	\$11,485.69

TIP: Any changes to the deal from Desking will require a **refresh** on the proposal or for the user to re-open the **QuickPencil** screen for changes to appear.

Note: QuickPencil presentations are not currently saved to the Notes & History or to the Desking Management Report. This functionality is only available through QuickPrint.