QuickPrint & QuickPencil

VinSolutions
Make every connection count.

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

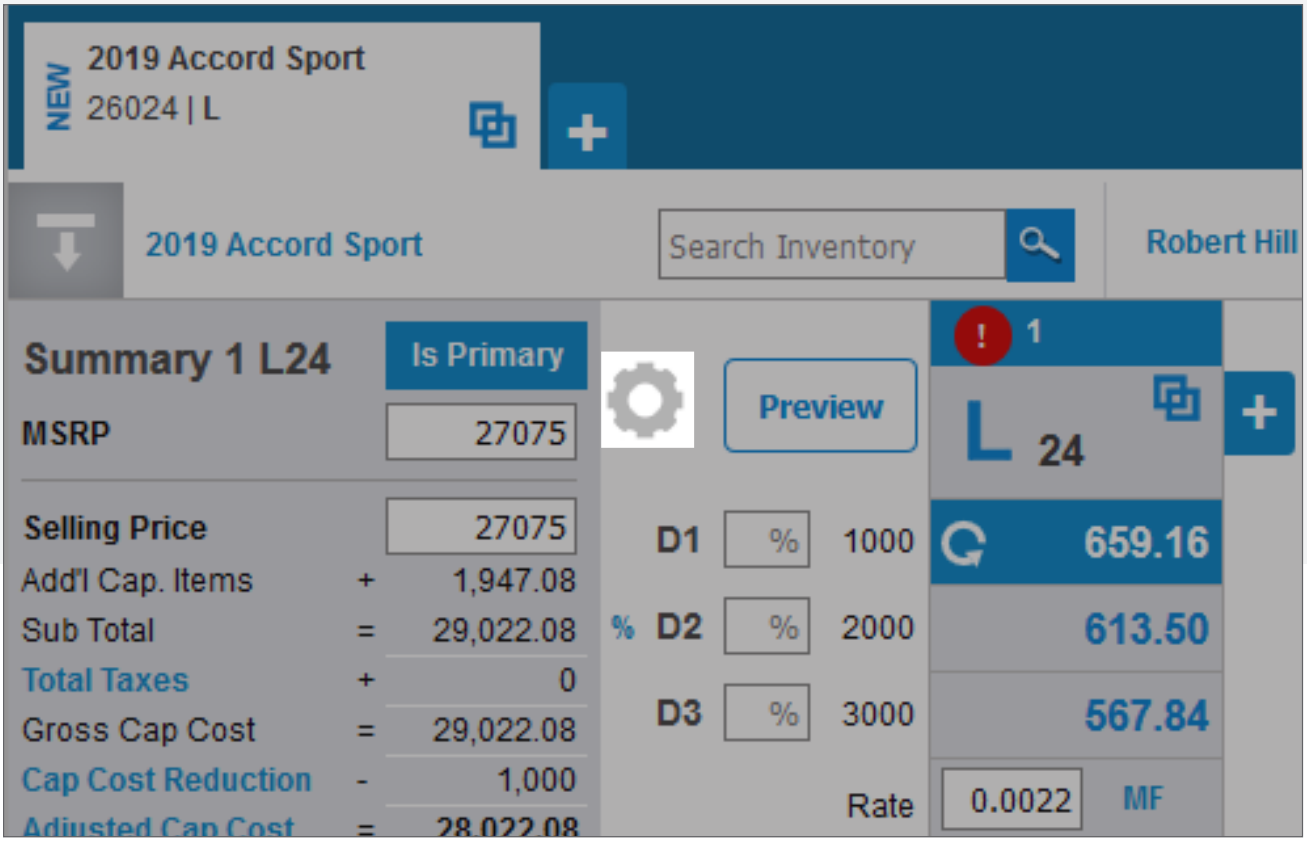
What is it?

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.

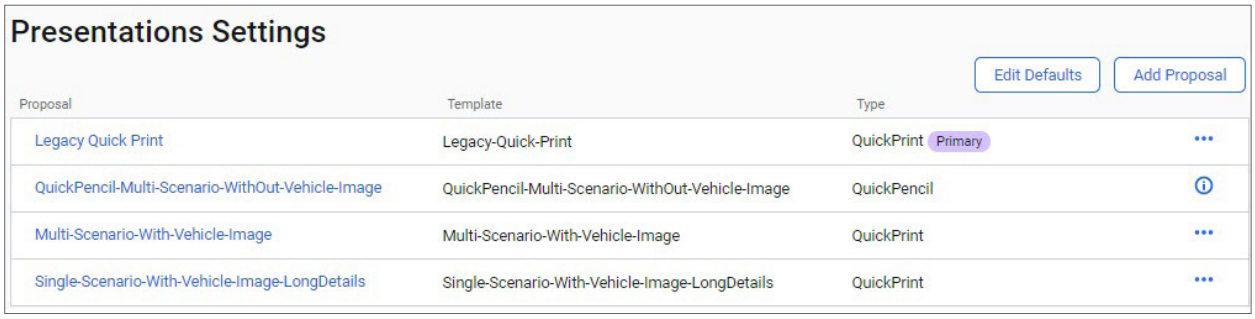
QuickPrint

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



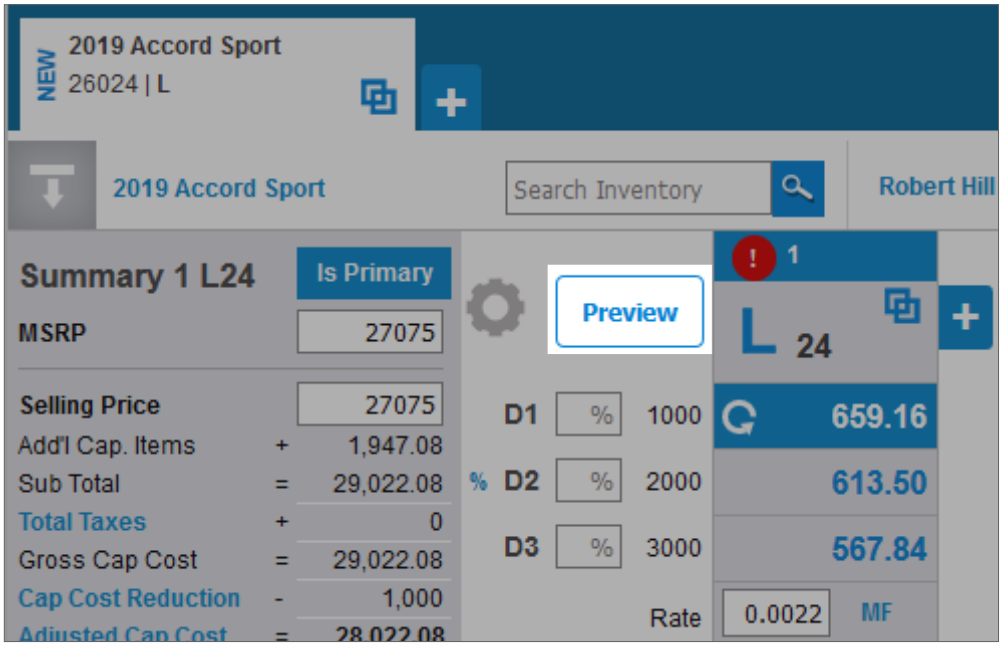
The **QuickPrint** Presentation Settings screen will open. From here you can Add, Copy, Remove, or Edit Default Proposals.



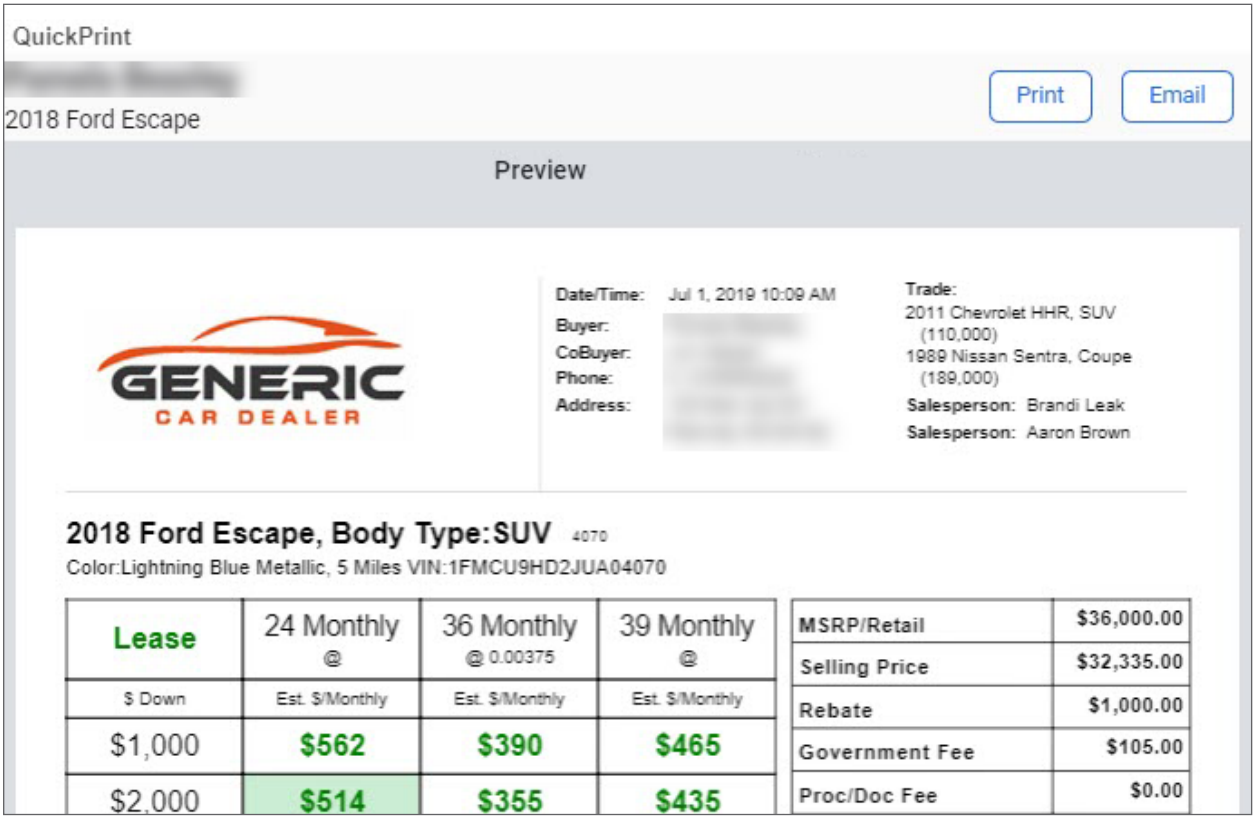
Button	What it Does
Edit Defaults	"Edit Defaults" allows you to select what information you would like to show or not show the customer. You can customize the default names of the proposals itemizations, add optional payment ranges, upload logo, and general settings. When a new proposal is added, the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

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**.



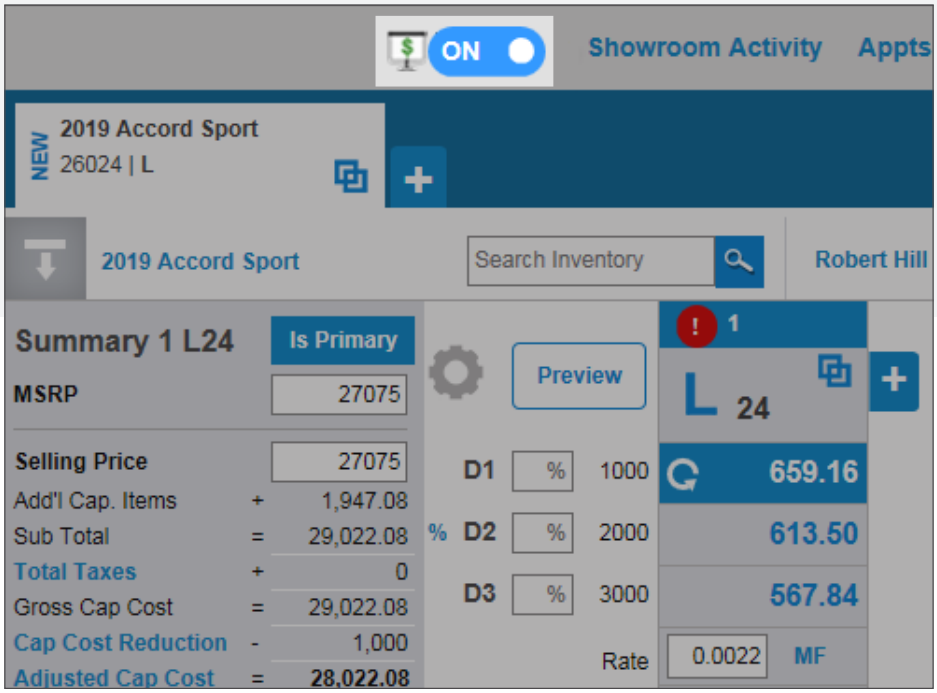
Button	What it Means
Print	Prints the below proposal as-is for customers present in the showroom. *Please note: All proposals printed are logged to the Notes & History of the Customer Dashboard for the given lead. Additionally, the printed proposals log to the Desking Management Report in Desking as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

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.

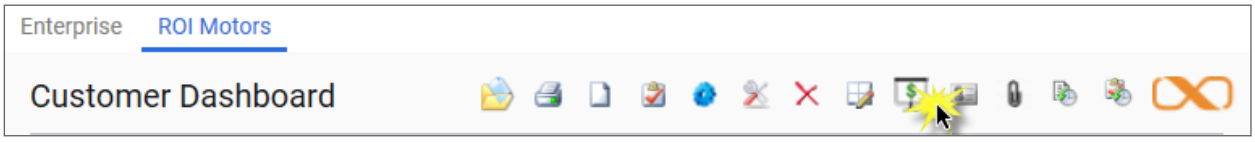
Once the deal has been desked, ensure the deal to present is set as the Primary Scenario then click on the **QuickPencil** toggle at the top to enable it from the Customer Dashboard for the salesperson.



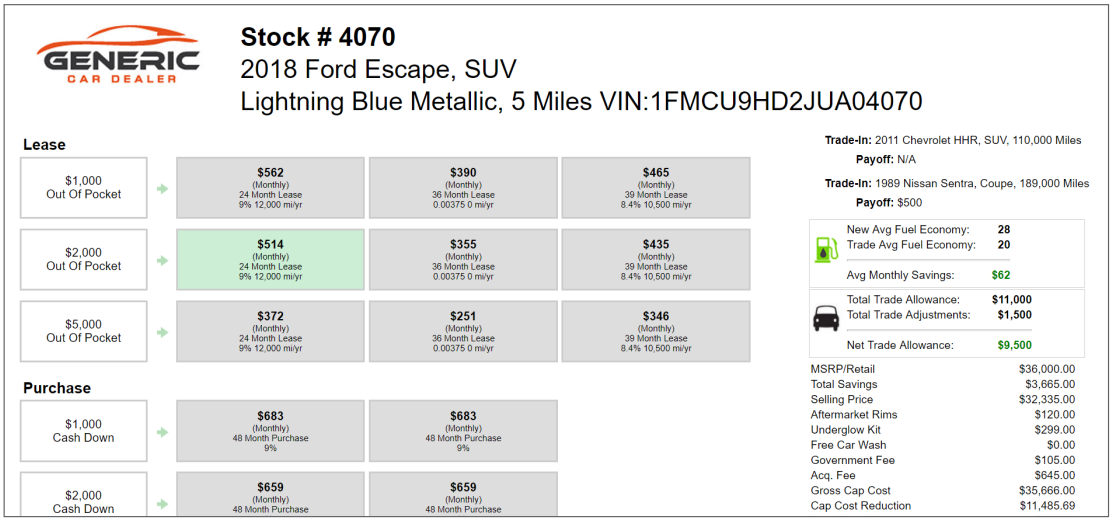
Button	What it Means
	QuickPencil is ON and the proposal will be accessible from the Customer Dashboard.
	QuickPencil is OFF and the proposal can only be accessible and printed from the Desking system.

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.



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.