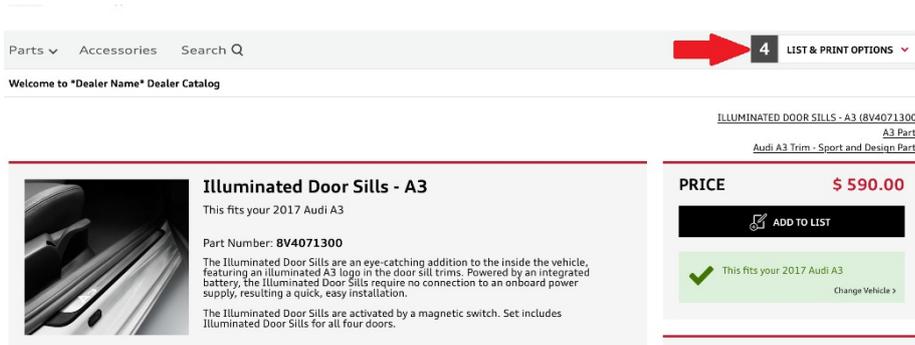


# How to Build a Quote

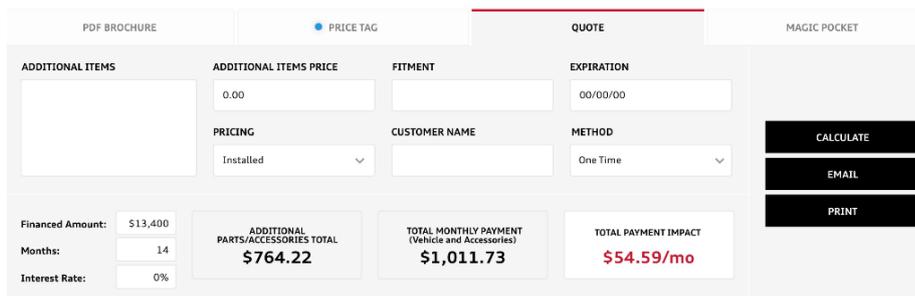
Last Modified on 09/01/2020 2:38 pm EDT

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 (PDF BROCHURE, PRICE TAG, QUOTE, MAGIC POCKET). The 'QUOTE' tab contains several input fields and buttons. The 'ADDITIONAL ITEMS' field is empty. The 'ADDITIONAL ITEMS PRICE' field contains '0.00'. The 'FITMENT' field is empty. The 'EXPIRATION' field contains '00/00/00'. The 'PRICING' dropdown is set to 'Installed'. The 'CUSTOMER NAME' field is empty. The 'METHOD' dropdown is set to 'One Time'. The 'CALCULATE', 'EMAIL', and 'PRINT' buttons are visible on the right side. The summary section shows: Financed Amount: \$13,400; Months: 14; Interest Rate: 0%; ADDITIONAL PARTS/ACCESSORIES TOTAL: \$764.22; TOTAL MONTHLY PAYMENT (Vehicle and Accessories): \$1,011.73; TOTAL PAYMENT IMPACT: \$54.59/mo.

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)