

## **Quote Entry**

## Hover over **Quote** and select **New**

D-000001 - TEST DEALERSHIP					•	Welcome	Help Logout
Quote 🔻	Contract 💌	Remittance	Claims	Reports	Settings		
New			- V				
Search							

On the Quote entry page, please complete all necessary highlighted fields.

Upon entering a VIN, the relevant vehicle information and plans available for sale on that vehicle will auto populate.

The fields highlighted in blue are **only required for GAP contracts**.

C(E)		D-000001 - TE	ST DEALERSHIP			•		Welcome	Help Logout
AutoXcel	® Quote 🔻	Contract 🔻	Remittance	Claims	Reports	Settings			
Quote									
Plan Purchase Date	F&I Manager/S	ales Associate							
01/01/2020									
Customer (Testington, T	est)								
First Name I	MI	Last Na	me	Title					
Test		Testingto	on		T				
Address	Address 2	City		State	ZIP	Primary Phone	e Secol	ndary Phone	
272 North Front Street		Wilmingt	on	NC	▼ 28401				]
Email /	Alternate Contact	Languag	je		and a second				
		English	V						
Vehicle (Passenger Car/	2017/HONDA/ACC	ORD/SPORT)							
VIN	Odometer	Mfg Warr St	tart Date Veh. I	Durohaaa Di	ion Vob Dur	Incore Data Auto	Code Owners	hin	
Y 11 Y	ouomotor	ivity. vvalt. S	tan Date Ven. I	Purchase Pr	ice ven. Puro	mase Date Auto	Coue Owners	snip	
	4725	01/01/2020	\$25,0	and the second se	01/01/202			1	
1HGCR2F56HA058788	4725	01/01/2020	\$25,0	00.00	01/01/202	*	New	Pre-Owned	
1HGCR2F56HA058788	4725 nger Car/2017/HON	01/01/2020	\$25,0	00.00	01/01/202	*	New	1	Co
1HGCR2F56HA058788 Attributes (Passer Stock # Base Warran	4725 nger Car/2017/HON nty Powertrain	01/01/2020	\$25,0	00.00	01/01/202	*	New	Pre-Owned	Со
HGCR2F56HA058788 ■ Attributes (Passer Stock # Base Warrar 36 / 36,000	4725 nger Car/2017/HON	01/01/2020	\$25,0	00.00	01/01/202	*	New	Pre-Owned	Co⊢
1HGCR2F56HA058788 Attributes (Passer Stock # Base Warrar 36 / 36,000	4725 nger Car/2017/HON nty Powertrain	01/01/2020	\$25,0	00.00	01/01/202	*	New	Pre-Owned	Coi
1HGCR2F56HA058788 Attributes (Passee Stock # Base Warrar 36 / 36,000 Additional Information Tire Information	4725 nger Car/2017/HON nty Powertrain	01/01/2020	\$25,0	00.00	01/01/202	*	New	Pre-Owned	Co
1HGCR2F56HA058788 Attributes (Passee Stock # Base Warrar 36 / 36,000 Additional Information Tire Information	4725 nger Car/2017/HON nty Powertrain	01/01/2020	\$25,0	00.00	01/01/202	*	New	Pre-Owned	Co
1HGCR2F56HA058788         Attributes       (Passe)         Stock #       Base Warran         36 / 36,000         Additional Information         Tire Information         W	4725 nger Car/2017/HON nty Powertrain	01/01/2020	\$25,0	00.00	01/01/202	*	New	Pre-Owned	Co
1HGCR2F56HA058788         Attributes       (Passe)         Stock #       Base Warrar         36 / 36,000         Additional Information         Tire Information         W         Loan/Lease	4725 nger Car/2017/HON nty Powertrain 60 / 60,000	01/01/2020 IDA/ACCORD/SP Warranty	\$25,0	00.00 an/4 Cylinder	01/01/202 s/Front Wheel	0 *	New	Pre-Owned	
1HGCR2F56HA058788         Attributes       (Passe         Stock #       Base Warrar         36 / 36,000         Additional Information         Tire Information         W         Loan/Lease	4725 nger Car/2017/HON nty Powertrain 60 / 60,000	01/01/2020	\$25,0	00.00 an/4 Cylinder	01/01/202	*	New	Pre-Owned	Co
1HGCR2F56HA058788 Attributes (Passe) Stock # Base Warrar 36 / 36,000 Additional Information Tire Information W Loan/Lease Deal Type Term Fit	4725 nger Car/2017/HON nty Powertrain 60 / 60,000	01/01/2020 IDA/ACCORD/SP Warranty	\$25,0	00.00 an/4 Cylinder	01/01/202 s/Front Wheel	0 *	New	Pre-Owned	
1HGCR2F56HA058788	4725 nger Car/2017/HON nty Powertrain 60 / 60,000	01/01/2020 IDA/ACCORD/SP Warranty	\$25,0	00.00 an/4 Cylinder	01/01/202 s/Front Wheel	0 *	New	Pre-Owned	
1HGCR2F56HA058788         Attributes       (Passe)         Stock #       Base Warran         36 / 36,000       36 / 36,000         Additional Information       Tire Information         W       Deal Type       Term         Lean/Lease       Deal Type       Term         Lienholder       Lienholder Name	4725 nger Car/2017/HON nty Powertrain 60 / 60,000 nance Amt M	01/01/2020 IDA/ACCORD/SP Warranty	\$25,0	00.00 lan/4 Cylinder	O1/01/202	0 * Drive/146 CID / 2.4	New	Pre-Owned	
IHGCR2F56HA058788         Attributes       (Passer         Stock #       Base Warrar         36 / 36,000       Additional Information         Tire Information       Tire Information         W       Deal Type       Term         Lienholder       Lienholder Name       Start typing lienholder name	4725 nger Car/2017/HON nty Powertrain 60 / 60,000 nance Amt M	01/01/2020 IDA/ACCORD/SP Warranty	\$25,0	00.00 lan/4 Cylinder	Monthly Pmt	0 * Drive/146 CID / 2.4	New L/Gas/Non Luxury Bailoon Amt	Pre-Owned	
IHGCR2F56HA058788         Attributes       (Passer         Stock #       Base Warrar         36 / 36,000       Additional Information         Tire Information       Tire Information         W       Deal Type       Term         Lienholder       Lienholder Name       Start typing lienholder name	4725 nger Car/2017/HON nty Powertrain 60 / 60,000 nance Amt M	01/01/2020 IDA/ACCORD/SP Warranty	\$25,0	00.00 lan/4 Cylinder	Monthly Pmt	0 * Drive/146 CID / 2.4	New	Pre-Owned	

In the Products tab, use the drop-downs to make your selections

Select the **Program** 

Under Type, select New or Used (if available)

Select the Plan

Select the Term length

Select the **Deductible** 

Under **Retail (excl. taxes)**, in the yellow area, enter the amount paid by the customer for the contract. Otherwise it defaults to zero or the base price.

			<u>Clear Template</u>				
	Program	Туре	Plan	Term	Deductible	<ul> <li>Retail (excl.taxes)</li> </ul>	
GAP	¥		¥	Ŧ			
\P	Appearance Protect <b>v</b>	New 🔻	¥	¥	¥		🗎 🗋 🗙
WT	Lease Wear and Te 🔻	Usec 🔻	AutoXcel Lease Wear	×	v		
AXBD	AutoXcel Bundles 💌	New 🔻		T	v		
COSW	Dynamic Wheel	New 🔻	Dynamic Wheel	48/999,999 🔻	0 🔻	\$258.00 v Options(1)	Submit 📄 週 🗙

Clicking the **Options** link will show a pop up window with options for Key, Hail, Rental, etc..

Put a check mark next to the ones you would like to add and click  $\ensuremath{\text{OK}}$ 

If you would like to save a quote in order to make changes to it later, click the **(1) Save Quote** button on the bottom right of the page. To view a saved quote, hover over Quote on the tool bar and select **Search**. A list of saved quotes will appear. Using the drop down selection beneath the tool bar, you can filter quotes by Last Name, VIN, Vehicle Description, Stock Number, or F&I Manager/Sales Associate.

Select	Options	Cost	
	Hail Coverage-3 Year		\$15.00
$\checkmark$	Key Class 1-2-3 Year Policy		\$19.00
	Rental Reimbursement		\$15.00
		Total:	\$19.00

Saved quotes will expire after 30 days.



COSW	Dynamic Wheel 🛛 🔻	New 🔻	Dynamic Wheel	48/999,999	<b>•</b> 0	¥	\$258.00	• Options(1	)	Submit 📄 ӣ 🗙
KEY	Key Coverage 🛛 🔻	¥	Y		r	¥				
TW	Dynamic Wheel Ma: <b>•</b>	•	v		r 📃	¥				
							\$258.00	٣		
							1	2	1	
							Save Q	uote Print (	Quote Clos	Se Cancel Changes

To print a quote, click (1) Save Quote then click (2) Print Quote

Click the **Preview** button to ensure everything was entered correctly.

Click Submit

Once submitted, a window will open with the full contract you just

created. You can **print** and **save** the contract from this window.

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Done				ii.



Submit

Preview