IGM-UB

HUB's Quick Quote now supports Menu-Selling by allowing you to create multiple quotes for comparison for your customers. Using the Quick Quote Comparison Tool, you can create up to four different quotes for a single customer, include additional Third Party Products in each quote, and save quote templates for specific vehicles. Print your Comparison Quotes for a quick and easy side-by-side comparison view to review with your customers.

Step 1 of 4: Set Up Third Party Products		Welco	ome, Jane	Ţ		English	~	Log Out	
You may add Third Party Products to a quote. To do so, set up the Third Party Product in your Dealership Profile (1).		Edit Security My Profile Company Pro							
On the Products (2) tab of your Dealership Profile , find the Third Party Products (3) section and click + Add New Product (4) to add a new Third Party Product.	Deale	r/Repai	r Acco	unt N		ement	t		
	Trading Nam	e		CONTACT	2 PRODU	JCTS LIE	NHOLDERS		
	Account ID			> Produ	ct Pricing				
			3	✓ Third I	Party Proc	ducts			
	Account Stat	us		4					
				+ Add Ne	w Product				
Specify the Product Type (5) and enter the additional product details.	✓ Third Pa	arty Products	5						
Note: All fields are mandatory when setting	+ Add New P			_	_	_	_	_	_
up a Third Party Product.	5 Product		Product						
Click OK (6) to save the Third Party Product.	Type - Type to see	1		/endor	Cost	Markup	GST/HST %		'QST
	- Type to set	arch-					90	%	
						6	ок	Cano	cel
The new Third Party Product is displayed in a table. Confirm the Active (7) checkbox									
is selected to ensure your Third Party	V Third Pa	arty Products	S						
Product is available in Quick Quote .	+ Add New P	roduct							
Note: You can only edit or delete a Third Party Product if the product has not been used in a quote. If a Third Party Product	Product Type	Product Name	Vendor	Cost	Markup	GST / HST	PST / QST	Active	
has been used in a quote and you need to change the product, uncheck the Active checkbox to deactivate the product and	Chemicals	Rust Protection	Joe's Chemicals	\$250.00	\$50.00	4.00 %	7.00 %	7	₹×
add a new Third Party Product.									

Step 2 of 4: Create Multiple Quotes

To begin, refer to the **Quote and Purchase a Contract** Quick Reference Guide to create a single quote. The first quote created is given the default name **Option "A"** (8) and any products selected belong to the **Option "A"** tab. Click on the name **Option "A"** to change the name to one of your choosing.

To create a second quote for comparison, click the 🕂 (9) icon. A new tab named **Option "B" (10)** appears.

Note: Any quote tab name may be changed by clicking the name and entering a new name.

Initially, **Option "B"** will contain the same selected product options chosen for **Option "A"**. Click on different products and product options to differentiate **Option "A"** from **Option "B"**.

You may create up to four different quotes for comparison by clicking . Each quote created will be a copy of the previous quote's selections.

To add a Third Party Product to a quote, click **+ Add Third Party Product (11)**.

Note: The **+ Add Third Party Product** link only appears on the Quick Quote page if a **Third Party Product** has been set up in your **Dealership Profile**.

Select the **Product Type (12)** and the **Product Name (13)**. Once the **Product Name** is selected, the **Vendor (14)**, **Retail Price (15)**, **GST/HST (16)** and **PST/QST (17)** fields are automatically populated. The **Retail Price**, **GST/HST** and **PST/QST** values can be updated on this screen.

Click **OK** (18) to add the Third Party Product to the quote. The Third Party Product is then added to the quote (19) with the product price displayed (20).

Note: As an example, the tab names have been updated to Platinum (21) and Gold (22).

Show Vehicle/Customer Details						
B OPTION "A" 9 ⊕ Cor	mpare All չ 준)					
Hyundai Appearance Pro	otection					
Hyundai Vehicle Loss Privilege Program						

Show Vehicle/Customer Details
OPTION "A" OPTION "B" Compare All 🖉
Hyundai Appearance Protection
Hyundai Vehicle Loss Privilege Program
+ Add Third Party Product

	Party Product						
12 Product Typ)e	Product Name	14 Ve	endor	15 Retail Prio	e 16 _{GST/HS}	TTPST/QST
- Type to s	earch - 🗸	- Type to search -	~			%	96
					1	8 OK	Cancel
					_	OK	Carreer
Shou	v Vehicle/C	ustomer Details					
21 PLATIN	NUM	22 GOLD	×	Compare	All 5 8		
🗆 Hyun	dai Appear	ance Protection					
🗆 Hyun	dai Vehicle	Loss Privilege Pro	ogram				
19	Protoction	· (Third Party Proc	luct)			20 \$300.0	o+Tax =>
		- (Third Party Proc					······································
+ Add Thir	d Party Produ	ct					

23

Step 3 of 4:

Compare All

Once all of your quotes have been created, click **Compare All** (23). The Comparison Tool displays all quotes sideby-side for easy comparison.

In the Quick Quote Comparison window, you may enter the Interest Rate (24) and the Term (mo) (25) on one quote, then click Update All (26) to apply the interest rate and term months across all quotes. Click the Calculate Payment (27) drop down menu to update the payment frequency; pricing will update dynamically when changing the Calculate Payment selection.

Use the **scroll bar** (28) to view the additional product details within the **Quick Quote Comparison** window.

Check **Add Taxes (29)** to view the cost with taxes included.

Click **Hide Product Pricing** (**30**) to display individual product pricing.

Click **Save Quote (31)** and give this set of quotes a name to save this group of quotes for future reference.

Click **Print All (32)** to print the **Quick Quote Comparison View** for your customer.

Click **Select (33)** to choose a particular quote; the quote appears selected in the **Quick Quote View**.

Show Vehicle/Customer Details

OPTION "A" OPTION "B" OPTION "C"

Compare All

OPTION "A"		OPTION "B"	,	OPTION "C"		
Hyundai Appearance P	rotection	Hyundai Appearance P	rotection	Hyundai Appearance Protection		
Plans: Term (mo): Term (km):	Platinum 60 250,000	Plans: Term (mo): Term (km):	Gold 48 250,000	Plans: Term (mo): Term (km):	Gold 24 250,000	
Monthly:	\$70.90	Monthly:	\$62.23	Monthly:	\$57.03	
Hyundai Vehicle Loss P	rivilege Program	Hyundai Vehicle Loss P	Privilege Program	Rust Proofing (Third-Party Pr	roduct)	
Plans:	Total Loss Event Privilege	Plans:	Partial Loss Event Privilege	Monthly:	\$13.01	
Term Month:	84	Term Month:	84			
Monthly:	\$60.89	Monthly:	\$66.70			
Interest Rate	25 Term (mo)	Interest Rate	Term (mo)	Interest Rate	Term (mo)	
2.009		2.00%	24	2.00%	6 24	
	26 Update All		Update All		Update All	
27	alculate Payment:	Monthly	✓ Add Taxes	29 🗌 Hide Prod	duct Pricing 30	
Month	5 \$131.79 Select 33	Monthly	\$120.95	Month	\$70.04	
	Select		Select		Select	

Step 4 of 4: **Purchase a Contract**

Click **Purchase (34)** to purchase the quote and print the contract(s) for your customer to sign.

Show Vehicle/Customer Details			
OPTION "A" OPTION "B"	OPTION "C"	🛨 Compare	All - SE
🖻 Hyundai Appearance Protection			
🖾 Hyundai Vehicle Loss Privilege Program	n		
+ Add Third Party Product			
Quote Summary Save Print Purchase	Retail Price \$2,974.00	^{gst} \$148.70	Total Payment \$3,122.70