







## Users Manual

## Opening a Sales Quote from the Desk Log

When eDESK is installed in a dealership a new column (Q) appears on the Desk log. This column contains a 'Sharpie' icon.

When Prospects (Showroom, Phone, Internet, Campaign) are 'Active' and put in the showroom, the Desk Log displays the 'Sharpie' icon.

To access the Sales Quote for any Customer on the Desk Log, simply select the Green Sharpie to the left of the Customer's Name. This will load the Dealership Default quote information into a Sales Quote.

Appointments for 8/31/2015					
Show	N/A	Customer	Due	Salesperson	Confirm
	N	Johnson, Sean	 2:30 PM	Carnes, Kevin	<input checked="" type="checkbox"/>
	N	Fetcher, Scott	 4:00 PM	Salesperson, Suzy	<input type="checkbox"/>

Total Appnts: 3      Confirmed: 2      Shown: 1      No Show: 0      Overdue: 0      Appts Sold: 0

Desktop Statistics		
Sold: 0	Be Back: 1	Write Up: 0
Showroom Sold: 0	Showroom: 3	Demo: 0
Internet Sold: 0	Internet: 0	Appraisal: 0
Phone Sold: 0	Phone: 0	Turn-Overs: 0
Campaign Sold: 0	Campaign: 0	Over 45 Mins: 0
Sold Total GP: 0.00		Sold Front GP: 0.00
Search Desktop: <input type="text"/> 🔍		

Fresh Ups: <input checked="" type="checkbox"/> Sold: <input checked="" type="checkbox"/> In Showroom: <input checked="" type="checkbox"/> Over 45 Min: <input checked="" type="checkbox"/> Left Showroom: <input checked="" type="checkbox"/>															
T	Up	In/Out	BB	A	Q	Customer	Sales Team	Phone	Vehicle	D	A	W	TO	LMC	Comments
N		In: 8/31/2015 9:36 AM Out:	<input type="checkbox"/>			Testinglead, Dominick Phone / radio	SP: Dominick, S* SP2: DM:	H: W: C:	W: T:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		0h	
N		In: 8/31/2015 9:36 AM Out:	<input type="checkbox"/>			Koby, Anne Working Internet / Getauto.com anne8824@koby2015.com	SP: BDCRep, S* SP2: DM:	H:(850) 888-0824 W: C:	W:2015 SLK-Class T:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		0h	
U		In: 8/31/2015 9:36 AM Out:	<input type="checkbox"/>			Wilson, Andrew New Showroom / radio	SP: Dominick, S* SP2: DM:	H: W: C:(877) 859-0195	W:2012 Avenger - CN259820 T:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		0h	

## Sales Quote Details

Save

☒ Print a worksheet

Cost

Invoice Plus

Reset Prices

History

Compare

Help

Reload

Customer

Dominick Testingelead

Trade In(s)

2004 Chevrolet Impala Police 4dr Sedan

Vehicle

2015 Mercedes-Benz GLA-Class Base GLA45 AMG 4dr All-wheel Drive 4MATIC

Credit

App

Score

600

Find Stock

FJ126514

Status

New

[eRetail Incentives](#)

Trim:

Base GLA45 AMG 4dr All-wheel Drive 4MATIC

Vehicle Age:

122

Miles:

9

Loan

Cash

Balloon

Lease

Estimated Payments

Lender:

Mercedes Benz Financial

Rate	Term	Cash Down	Cash Down	Cash Down
9.99	24	1,750.00	2,750.00	3,750.00
9.99	36	2,917.27	2,870.78	2,824.28
9.99	48	2,039.83	2,007.32	1,974.81
		1,603.27	1,577.72	1,552.17

RB

LTV

Rates

Program Name:

Amount Financed:

62,747.72

61,747.72

60,747.72

Carry %:

110

108

107

Days 1st Pymt:

45

Basis of Carry:

Invoice

56,923.00

Price

Cost

Vehicle:

60,345.00

57,418.46

Add Ons:

899.00

0.00

Discount:

RB

0.00

Net Price:

61,244.00

Fees:

1,301.50

Rebate:

0.00

0.00

Trade Allow:

4,500.00

8,000.00

Pay Off:

3,000.00

Net Trade:

1,500.00

Back Ends:

0.00

0.00

Sales Tax:

3,452.22

Balance:

RB

64,497.72

0.00

Front Gross:

RB

7,325.54

0.00

Back Gross:

1,086.48

7.99

Total Gross:

8,412.02

25.00

Dealer Cash

Trade ACV

Buy Rate

% Bank Resrv.

Comments:

The Sales Quote opens with pre-loaded Dealership Default information. The Sales Quote screen gives the User the functionality to perform many aspects of the Deal Desking process. The tool bar at the top of the window allows the User to Save the Quote, Print a Worksheet, Display/Remove Cost Information, Turn On/Off the Invoice Plus Option, Reset Prices to the Dealership Defaults, Post to F&I, and access a Help Menu.

## Customer Hyper-Link and Opportunity Details

Save ☒ Print a worksheet | Cost Invoice Plus Reset Prices Post to FI

Customer: DARRELL WILLIAMS

Trade In(s): 2002 Toyota Camry LE (A4) 4dr Sedan

Vehicle: 2014 Chevrolet Sonic LS Auto 4dr Sedan















Trim: LS Auto 4dr Sedan





Vehicle Age: 170 Miles: 25

Loan Cash Balloon Lease

Estimated Payments Price

The [Customer](#) Hyper-Link will load the Opportunity Details page. This page displays the Customer history, Contacts, Relationship, Lifetime Value, etc. The Opportunity Details page allows the User to edit Customer and Opportunity Information. In addition, a new 'Quote' icon appears for 'Desk Manager' only, so managers can work a deal on 'Active' prospect not on the desk log. The Yellow dot next to 'Customer' means phone, address or email is missing. If Red, There is not a 'County' to calculate taxes.

Opportunity Details				
eBrochure 	Email 	Letter 	Phone 	Showroom 
Schedule 	Credit App 	Worksheet 	Add Note 	Print Info 
Merge 				
<div style="float: left; width: 48%;"> <h3 style="margin: 0;">CUSTOMER</h3> <div style="display: flex; justify-content: space-between; align-items: flex-start; padding: 10px;"> <div style="width: 45%;">   <b>Scan</b> </div> <div style="width: 50%;"> <p><b>Name:</b> DARRELL WILLIAMS</p> <p><b>Address:</b> 1307 OAK HILL ROAD BRYANT, AR 72022</p> <p><b>Home #:</b> (501) 398-2308</p> <p><b>Work #:</b></p> <p><b>Cell #:</b></p> <p><b>Preferred Email:</b> MRDWILLIAMS81@GMAIL.COM</p> <p><b>Birthday:</b></p> <p><b>Available for CallCenter:</b> <input type="checkbox"/></p> <p><b>Last Modified:</b> 7/18/2014 1:21:16 PM</p> <p><b>High Priority:</b> <input type="checkbox"/></p> </div> <div style="width: 5%; text-align: center;">  </div> </div> </div> <div style="float: right; width: 48%;"> <h3 style="margin: 0;">OPPORTUNITY</h3> <div style="display: flex; justify-content: space-between; align-items: flex-start; padding: 10px;"> <div style="width: 45%;">   <b>Scan</b> </div> <div style="width: 50%;"> <p><b>Vehicle:</b> New 2014 Chevrolet Sonic LS Auto 4dr Sedan 1G1JA5SH6E4137339</p> <p><b>Stock #:</b> E4137339</p> <p><b>Trade:</b> 2002 Toyota Camry LE (A4) 4dr Sedan JTDBE32K820099857</p> <p><b>Sales Teams:</b> Wehrli, Rodney - Primary Salesperson Benton, Clark - Salesperson Holt, Troy - Primary Desk Manager Smith, Tanya - Primary BDC Agent</p> <p><b>UpType:</b> Internet Up</p> <p><b>Source:</b> LeadStorm</p> <p><b>Date/Time Due:</b> 7/21/2014 2:40:47 PM</p> <p><b>Sales Status:</b> <span style="border: 1px solid black; padding: 2px;">Int-Mgr Review</span></p> </div> </div> <div style="margin-top: 10px; text-align: right;"> <p>In Showroom <input type="checkbox"/> TO <input type="checkbox"/> Write Up <input type="checkbox"/> Demo <input type="checkbox"/></p> </div> </div>				

| Contacts Service Relationships Ins/Other Lifetime Value Vehicles Audit Trail  Scheduled Contact Activities  | Due                  | Type  | Assigned To | Comment | Action  | |----------------------|---|-------------|---------|---| | 7/21/2014 2:40:47 PM |  Question From Manager (Auto) | Wehrli, R   |         | <span style="border: 1px solid black; padding: 2px;">...</span> <a href="#">Complete</a> <a href="#">Edit</a> | | 2/2/2016 1:40:00 PM  |  Phone Follow Up             | Wehrli, R   |         | <span style="border: 1px solid black; padding: 2px;">...</span> <a href="#">Complete</a> <a href="#">Edit</a> | | 2/2/2016 4:00:00 PM  |  Send Email                  | Wehrli, R   |         | <span style="border: 1px solid black; padding: 2px;">...</span> <a href="#">Complete</a> <a href="#">Edit</a> |  Completed Opportunity Activity History  | Date                 | Activity Type   | Outcome             | Comments  | Completed By | Action               | |----------------------|---|---------------------|---|--------------|----------------------| | 7/17/2014 2:41 PM    | Active - Int-Mgr Review   | WebLink - LeadStorm |   | Wehrli, R    |                      | | 7/18/2014 1:21:17 PM |  Phone Follow Up | Completed           | can only get done on a Sonic. Will NOT buy a Sonic. Hates them. | Benton, C    | <a href="#">View</a> | | | | | |

## Vehicle Search Screen

Save

☒ Print a worksheet

Cost

Invoice Plus

Reset Prices

History

Compare

Help

Reload

Customer

Dominick Testinglead

Trade In(s)

2004 Chevrolet Impala Police 4dr Sedan

Vehicle

2015 Mercedes-Benz GLA-Class Base GLA45 AMG 4dr All-wheel Drive 4MATIC

Trim:

Base GLA45 AMG 4dr A

Vehicle Age:

122

Loan

Cash

Balloon

Lease

Estimated Payments

Lender: Mercedes Benz Financial

Rate

Term

9.99

24

9.99

36

9.99

48

RB

LTV

Rates

Amount Financed

Carry %

Days 1st Pymt: 45

Basis

Carry

Comments:

Credit App

Score

600

Find Stock

FJ126514

Status

New

[Retail Incentives](#)

Search

Clear Search

Export

Print

Search

Max Margin

☒ Generic
 ☒ New
 ☒ Used
 ☐ Trade In
 ☐ Show Only Sold Vehicles
 ☐ Ignore Sold Vehicles

Stock #:

VIN #:

Mileage:

Year:

2015

Exterior Color:

MSRP:

Make:

Interior Color:

Price:

Model:

DMS Status:

Invoice:

Model Number:

Location:

Date Acquired:

Legend:

☐ Available

☒ Working in eDesk

☐ Sold to Customer

☐ Inbound Trade

☐ Outbound Trade

Matching Vehicles: 0

Column Configuration

Click Row of Desired Selection

Stock #	Year	Make	Model	Trim	N/U/T	Mileage	Age	Ex

When a Customer is entered into eLEAD with a stock number, that unit and pricing will load into the quote screen.

The User can also search available Inventory by clicking on the [Find Stock](#) (circled above), which will pop-up the Inventory Search window. Vehicles can be searched through several characteristics, to include: Year, Make, Model, New, Used and other features or price levels. There is a setting to Ignore vehicles that have been previously Sold. This option can be deselected to view the entire Inventory, regardless of status. When searching the dealership Inventory, the default search will return all vehicles, *unless the Ignore Sold Vehicles box has been checked*. The radio button (New, Used, or Both) is used to narrow down the vehicles returned.

# Edit Trade-In Hyper-Link

Save | ☒ Print a worksheet | Cost | Invoice Plus | Reset Prices

Customer: Dominick Testingelead

**Trade In(s)**: 2004 Chevrolet Impala Police 4dr Sedan

Vehicle: 2015 Mercedes-Benz GLA-Class Base GLA45 AMG 4dr All-wheel Drive 4MATIC

Trim: Base GLA45 AMG 4dr All-wheel Drive 4MATIC

Vehicle Age: 122 Miles: 9

Loan | Cash | Balloon | Lease

Estimated Payments | Price

Once the [Edit Trade-In\(s\)](#) Hyper-Link is selected, the screen below will appear.

https://eleadcrm.com/?IDID=183307161&stat=15&fst=Dominick&lst=Testingelead...

Save | New | Delete | 1 of 1 | Appraisal Wizard

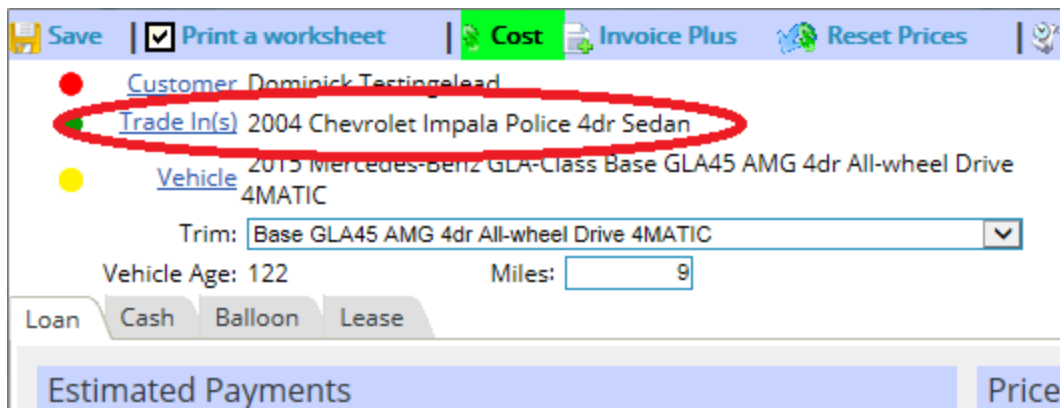
VIN: 2g1wf52k149417930	Ext. Color: White
Mileage: 65000	Int Color:
Year: 2004	Interior Type:
Make: Chevrolet	Fuel:
Model: Impala	Transmission: Standard
Trim: Police 4dr Sedan	
Trade Allowance: 4,500.00	ACV \$: 8,000.00
Payoff: 3,000.00	Appraised By: Use, DoNot
Good Until: 8/31/2015	Date Appraised: 8/31/2015
Net Trade: 1,500.00	Plate Number:
Lender Name:	Reg Number:
Lender Acct. #:	Title State:
Lender Phone:	Title Status:
Insurance Co:	Insurance Policy #:

Leased (No Tax Credit): ☐

Comment:

## Edit Trade-In Hyper-Link Cont.

The [Edit Trade-In\(s\)](#) Hyper-Link screen displays the information about the Trade Vehicle. If the VIN of the Trade Vehicle is entered, the User can press the TAB key and the Year, Make, and Model will populate automatically. Otherwise the User can enter the Year, Make, and Model from the dropdowns. The Trade Allowance, Pay Off, and Trade ACV can then be entered, along with the remaining information, if applicable.



The screenshot shows a software interface for editing trade-in information. At the top, there is a toolbar with buttons: 'Save', 'Print a worksheet' (checked), 'Cost', 'Invoice Plus', and 'Reset Prices'. Below the toolbar, there are three items listed with colored dots: a red dot next to 'Customer Dominick Testingelead', a green dot next to 'Trade In(s) 2004 Chevrolet Impala Police 4dr Sedan', and a yellow dot next to 'Vehicle 2015 Mercedes-Benz GLA-Class Base GLA45 AMG 4dr All-wheel Drive 4MATIC'. The 'Trade In(s)' item is circled in red. Below the 'Vehicle' item, there is a dropdown menu for 'Trim' showing 'Base GLA45 AMG 4dr All-wheel Drive 4MATIC'. Below the dropdown, there are fields for 'Vehicle Age: 122' and 'Miles: 9'. At the bottom, there are tabs for 'Loan', 'Cash', 'Balloon', and 'Lease'. Below the tabs, there is a table with two columns: 'Estimated Payments' and 'Price'.

Once the Trade Information is Saved, the Sales Quote screen will updated accordingly.

The Green Dot next to Trade means all required information is entered. If Red, ACV is missing.

# Edit Vehicle Hyper-Link

Save | ☒ Print a worksheet | Cost | Invoice Plus | Reset Prices

● [Customer](#) Dominick Testinglead

● [Trade In\(s\)](#) 2004 Chevrolet Impala Police 4dr Sedan

● [Vehicle](#) 2015 Mercedes-Benz GLA-Class Base GLA45 AMG 4dr All-wheel Drive 4MATIC

Trim: Base GLA45 AMG 4dr All-wheel Drive 4MATIC

Vehicle Age: 122 Miles: 9

Loan | Cash | Balloon | Lease

The [Edit Vehicle](#) Hyper-Link will open the Vehicle Inventory screen (**window below**). The Vehicle Inventory screen displays all of the information about the selected vehicle from the Dealerships Inventory. If the Wanted vehicle information was completed on the Prospect Information screen, the Year, Make, Model, and Trim will populate accordingly.

https://eleadcrm.com/?vid=138660598&stat=15&allowcost=true&lock=false&...

Save | New | Appraisal Wizard

* New/Used:	New		* VIN:	WDDTG5CB7FJ126514
* Stock #:	FJ126514		* Make:	Mercedes-Benz
* Year:	2015		Trim:	Base GLA45 AMG 4dr All-whee
* Model:	GLA-Class		Model Number:	GLA45
Model Details:	2015 Mercedes-Ben		Mileage:	9
Interior Color:	2801/Black		* Vehicle Status:	Working
Exterior Color:	2696/Black		* Cost \$:	57,418.46
* Retail Price \$:	60,345.00		Holdback \$:	0.00
* MSRP \$:	60,345.00		Invoice \$:	56,923.00
Internet Price \$:	59,845.00		Age:	122
Date Acquired:	5/1/2015		Memo 1:	
Location:			Memo 2:	
Weight:			<input type="checkbox"/> Generic Stock	
Type:	C			
DMS Updated Date:				



# Printing a Worksheet for a Customer

The screenshot shows the eleadcrm.com interface. In the top toolbar, the 'Print a worksheet' button is highlighted. A dropdown menu is open, showing options like 'Cash Worksheet', 'Invoice Plus Worksheet', and 'Retail / Lease NC NR', with the latter being circled in red. The main window displays a vehicle quote for a 2015 Mercedes-Benz GLA-Class, including details like VIN, color, and price. A 'Retail Payments' table is also visible.

Retail Payments		Estimated		
Cash Down		1,750	2,750	3,750
24 Months		2,918	2,871	2,825
36 Months		2,040	2,008	1,975
48 Months		1,604	1,578	1,553

\* Estimated A.P.R. Subject to equity and credit requirements.

To print a worksheet, click on the Print a Worksheet option in the tool bar. Select the Worksheet you want to print from the pull down (double click). The Worksheet will populate in a new Browser. REVIEW the Worksheet to ensure the information is accurate as to what you want to present to the Customer. Select the Print icon at the top left of the Worksheet Browser. A Sharpie with a 'Q' will be displayed on the Desk Log signifying a Quote has been provided.

# Hiding the Cost of the Vehicle

If the User is going to use eDesk in front of the Customer, or wants to share information regarding the Quote with the Customer, the User can hide the Cost Values for the Quote. Click on the COST option in the toolbar to hide the values, and click on the COST option again for the values to reappear.

The screenshots show the eLeadCRM software interface. The top screenshot highlights the 'Cost' button in the toolbar with a red circle. The bottom screenshot shows the same interface with the 'Cost' button highlighted by a black arrow, indicating the action to toggle the cost values on or off.

**Customer:** Dominick Testinglead  
**Trade In(s):** 2004 Chevrolet Impala Police 4dr Sedan  
**Vehicle:** 2015 Mercedes-Benz GLA-Class Base GLA45 AMG 4dr All-wheel Drive 4MATIC  
**Trim:** Base GLA45 AMG 4dr All-wheel Drive 4MATIC  
**Vehicle Age:** 122 **Miles:** 9

**Loan** Cash Balloon Lease

**Estimated Payments**

Lender: Mercedes Benz Financial

Rate	Term	Cash Down	Cash Down	Cash Down
9.99	24	1,750.00	2,750.00	3,750.00
9.99	36	2,917.27	2,870.78	2,824.28
9.99	48	2,039.83	2,007.32	1,974.81
9.99	48	1,603.27	1,577.72	1,552.17

Amount Financed: 62,747.72 61,747.72 60,747.72  
 Carry %: 110 108 107  
 Days 1st Pymt: 45  
 Basis of Carry: Invoice 56,923.00

**Price**

Vehicle: 60,345.00  
 Add Ons: 899.00  
 Discount: 0.00  
 Net Price: 61,244.00  
 Fees: 1,301.50  
 Rebate: 0.00  
 Trade Allow: 4,500.00  
 Pay Off: 3,000.00  
 Net Trade: 1,500.00  
 Back Ends: 0.00  
 Sales Tax: 3,452.22

**Cost**

Vehicle: 57,418.46  
 Add Ons: 0.00  
 Dealer Cash: 0.00  
 Trade ACV: 8,000.00  
 Deposit: 0.00  
 Hold Back: 0.00  
 Buy Rate: 7.99  
 % Bank Resrv: 25.00

**Comments:**

# Changing the Lender

The screenshot shows the eLEAD CRM interface in Internet Explorer. The browser address bar displays: <https://eleadcrm.com/?IDealID=186139879&IPersonID=144765031&IChildCompanyID=1>. The page title is "Support, Paul - - Internet Explorer".

The interface includes a top navigation bar with buttons: Save, Print a worksheet, Cost, Invoice Plus, Reset Prices, Post to FI, History, Compare, Help, and Reload. Below this, there are tabs for Customer, Vehicle, and Loan. The Customer tab is active, showing "Paul Support" and "Trade In(s)". The Vehicle tab shows "GENERIC - 2015 Nissan Frontier S (M5) 4x2 King Cab 6 ft. box 125.9 in. WB". The Loan tab shows "Loan" selected, with "Vehicle Age: 374" and "Miles: ". A red circle highlights the "Lender" dropdown menu, which is open, showing a list of lenders: "HUNTINGTON NATIONAL BANK", "Infiniti Financial Services" (selected), "READS Merican Handa Fenanice", and "test navigate".

The "Price" and "Cost" sections are visible on the right. The "Price" section includes fields for "Vehicle: 17,990.00", "Add Ons: 0.00", "Discount: 17,990.00", "Net Price: 0.00", "Fees: 0.00", "Rebates: 0.00", "Trade Allow: 0.00", "Pay Off: 0.00", "Net Trade: 0.00", "Back Ends: 0.00", and "Sales Tax: 131.25". The "Cost" section includes fields for "Vehicle: 0.00", "Add Ons: 0.00", "Discount: 0.00", "Net Price: 0.00", "Fees: 0.00", "Rebates: 0.00", "Trade Allow: 0.00", "Pay Off: 0.00", "Net Trade: 0.00", "Back Ends: 0.00", and "Sales Tax: 131.25".

The "Comments" section is at the bottom, with a text area and a green plus icon.

To change the lender for a Quote, click on the Lender arrow. Select the Lender of your choice from the dropdown menu. If you want to add New Lenders, please contact eLEAD Support to assist you.

# Editing Add Ons, Fees, Back Ends, & Sales Tax

Price		Cost	
Vehicle:	60,345.00		57,418.46
<a href="#">Add Ons:</a>	899.00		0.00
<a href="#">Discount:</a> <a href="#">RB</a>	0.00		
Net Price	61,244.00		
<a href="#">Fees:</a>	1,301.50		
Rebate:	0.00	0.00	Dealer Cash
Trade Allow:	4,500.00	8,000.00	Trade ACV
Pay Off:	3,000.00		
Net Trade	1,500.00		
<a href="#">Back Ends:</a>	0.00	0.00	
<a href="#">Sales Tax:</a>	3,452.22		
Balance: <a href="#">RB</a>	64,497.72	0.00	Deposit
Front Gross: <a href="#">RB</a>	7,325.54	0.00	Hold Back
Back Gross:	1,086.48	7.99	Buy Rate
Total Gross:	8,412.02	25.00	% Bank Resrv.

The [Add Ons](#), [Fees](#), [Back Ends](#), and [Sales Tax](#) for each Quote can be edited by clicking on any of the hyper-links above. These are unique for each payment type. If a value is changed in a specific Quote type (i.e. Retail), it will not be changed on any other Quote type (i.e.. Lease) automatically. The User will need to adjust each Quote type accordingly.

# Invoice Plus

Save

☒ Print a worksheet

Cost

**Invoice Plus**

Reset Prices

History

Compare

Help

Reload

Customer

Dominick Testinglead

Trade In(s)

2004 Chevrolet Impala Police 4dr Sedan

Vehicle

2015 Mercedes-Benz GLA-Class Base GLA45 AMG 4dr All-wheel Drive 4MATIC

Trim:

Base GLA45 AMG 4dr All-wheel Drive 4MATIC

Vehicle Age:

122

Miles:

9

Credit

App

Score

600

Find Stock

FJ126514

Status

New

eRetail Incentives

Loan

Cash

Balloon

Lease

Estimated Payments

Lender: Mercedes Benz Financial

Rate	Term	Cash Down	Cash Down	Cash Down
9.99	24	1,750.00	2,750.00	3,750.00
9.99	36	2,917.27	2,870.78	2,824.28
9.99	48	2,039.83	2,007.32	1,974.81
		1,603.27	1,577.72	1,552.17

RB

LTV

Rates

Program Name:

Amount Financed:

62,747.72

61,747.72

60,747.72

Carry %:

110

108

107

Days 1st Pymt:

45

Basis of Carry:

Invoice

56,923.00

Price

Cost

Vehicle:

60,345.00

57,418.46

Add Ons:

899.00

0.00

https://eleadcrm.com/ - Invoi...

Accept

Commission:

250.00

Facility Expense:

45.00

Floorplan Interest:

50.00

Inventory Control:

36.00

Advertising:

130.00

Dealer Profit:

3.0000

Include Hold Back:

☐

Comments:

The Invoice Plus option allows the User to pencil an Invoice Plus Quote with the convenience of clicking a button. If the Invoice Plus Option is OFF, the Invoice Plus option in the toolbar (see above) will be NOT be highlighted. If the Invoice Plus Option is ON, the Invoice Plus Option button will be highlighted. When the button is clicked, the above Invoice Plus pop-up will appear. The User can configure the details accordingly, and click on Accept. This will automatically update the Quote with the information selected.

## Using the Roll Back Function

[illegible]

The Roll Back ([RB hyper-link](#)) function allows the User to specify a payment, in effect changing the other components of the Quote to be structured around the desired payment. Once the desired payment has been entered, select which value to “Roll To”, click the Accept button and the figures on the Quote will be automatically adjusted.

# Loan to Value

Save | ☒ Print a worksheet | **Cost** | Invoice Plus | Reset Prices | History | Compare | Help | Reload

Customer: Dominick Testinglead | Credit App Score: 600

Trade In(s): 2004 Chevrolet Impala Police 4dr Sedan | Find Stock: FJ126514

Vehicle: 2015 Mercedes-Benz GLA-Class Base GLA45 AMG 4dr All-wheel Drive 4MATIC | Status: New

Trim: Base GLA45 AMG 4dr All-wheel Drive 4MATIC

Vehicle Age: 122 | Miles: 9

Loan | Cash | Balloon | Lease

### Estimated Payments

Lender: Mercedes Benz Financial

Rate	Term	Cash Down	Cash Down	Cash Down
9.99	24	1,750.00	2,750.00	3,750.00
9.99	36	2,917.27	2,870.78	2,824.28
9.99	48	2,039.83	2,007.32	1,974.81
		1,603.27	1,577.72	1,552.17

Program Name:

Amount Financed: 62,747.72 | 61,747.72 | 60,747.72

Carry %: 110 | 108 | 107

Days 1st Pymt: 45 | Basis of Carry: Invoice | 56,923.00

Comments:

### Price

Vehicle: 60,345.00

Add Ons: 899.00

Discount: RB 0.00

Net Price: 61,244.00

Fees: 1,301.50

Rebate: 0.00

Trade Allow: 4,500.00

Pay Off: 3,000.00

Net Trade: 1,500.00

Back Ends: 0.00

Sales Tax: 3,452.22

### Cost

Vehicle: 57,418.46

Add Ons: 0.00

Dealer Cash: 0.00

Trade ACV: 8,000.00

Balance: RB 64,497.72 | 0.00 Deposit

Accept

Carry %: 100.00 | Base \$: 56,923.00 | Overage: 5,824.72

Loan Amount: 62,747.72 | Max Carry \$: 56,923.00 | Roll To: <Select>

New <Select>: Discount | Trade Allowance | Vehicle Price | Cash Down

New Gross:

Banks lend their money according to guidelines; which dictate the structure of the Quotes prepared for the Customers. The [LTV](#) hyper-link allows the dealership to make necessary changes to the Quote according to these guidelines. The changes are made in the Loan to Value window above. Selecting where the “Roll Overage To:” allows the system to re-calculate with the selected parameters. Clicking on the Accept button will update the Quote with the new information.



# Disclosure Statement

https://eleadcrm.com/?IDealID=183307161&IPersonID=142477438 - Testinglead, Dominick - Sales: S - Internet Explorer

Save | ☒ Print a worksheet | Cost | Invoice Plus | Reset Prices | History | Compare | Help | Reload

Customer: Dominick Testinglead  
Trade In(s): 2004 Chevrolet Impala Police 4dr Sedan  
Vehicle: 2015 Mercedes-Benz GLA-Class Base GLA45 AMG 4dr All-wheel Drive 4MATIC  
Trim: Base GLA45 AMG 4dr All-wheel Drive 4MATIC  
Vehicle Age: 122 Miles: 9

Credit App Score: 600  
Find Stock: FJ126514  
Status: New  
eRetail Incentives

Loan | Cash | Balloon | Lease

**Estimated Payments**  
Lender: Mercedes Benz Financial  
☒ Cash Down Only  
☐ Cash Down + Inception Fees  
Rate: 0.00520 Term: 24  
0.00520 36  
0.00520 48  
RB LTV **DSC**  
Up Front: 1,750.00  
Residual: 39,900.80  
Annual Mileage: 7500  
MSRP: 62,345.00

**Price**  
Vehicle: 60,345.00  
Add Ons: 899.00  
Discount: RB 0.00  
Net Price: 61,244.00

**Cost**  
Vehicle: 57,418.46  
Add Ons: 0.00

**Cap Cost Reduction**  
Trade Allowance: + 4,500.00  
Payoff: - 3,000.00  
NET Trade: = 1,500.00  
Rebate: + 0.00  
Total Customer Paid Cash: + 1,750.00  
Inception Fees: - 2,095.17  
Net Cap Cost Reduction: = 1,154.83  
Taxed Cash Down: 0.00

**Cap Cost**  
Selling Price: 60,345.00  
Discount: - 0.00  
Fees: + 1,294.00  
Add Ons: + 899.00  
Back End Adds: + 0.00  
Capitalized Taxes: + 41.94  
Gross Cap Cost: = 62,579.94  
Net Cap Cost Reduction: - 1,154.83  
Net Cap Cost: = 61,425.11

**Residual**  
MSRP: + 62,345.00  
MSRP Adds: + 0.00  
Total MSRP: = 62,345.00  
Residual Factor: 0.64  
Annual Mileage: 7,500  
Base Residual: = 39,900.80  
Estimated Mileage: 0  
Pre-Charge: 0.20  
Mileage Adjustment: - 0.00  
Excess Mileage Amount: - 0.00  
Residual Adjustment: + 0.00  
Adjusted Residual: = 39,900.80

**Monthly Payment**  
Lease Depreciation: + 896.85  
Lease Charge: + 526.89  
Base Lease Payment: = 1,423.74  
Fees: + 0.00  
Use Tax: + 85.42  
Total Payment: = 1,509.16

Comments:

The Disclosure Statement ([DSC hyper-link](#)) is a read only snapshot of the components involved in the current Lease Quote.



# Inception Fees

https://eleadcrm.com/?IDealID=183307161&IPersonID=142477438 - Testinglead, Dominick - Sales: S - Internet Explorer

Save | ☒ Print a worksheet | **Cost** | Invoice Plus | Reset Prices | History | Compare | Help | Reload

Customer: Dominick Testinglead | Credit App Score: 600 | Find Stock: FJ126514 | Status: New | eRetail Incentives

Trade In(s): 2004 Chevrolet Impala Police 4dr Sedan

Vehicle: 2015 Mercedes-Benz GLA-Class Base GLA45 AMG 4dr All-wheel Drive 4MATIC | Trim: Base GLA45 AMG 4dr All-wheel Drive 4MATIC | Vehicle Age: 122 | Miles: 9

Loan | Cash | Balloon | Lease

### Estimated Payments

Lender: Mercedes Benz Financial

☒ Cash Down Only  
☐ Cash Down + Inception Fees

Rate	Term	RF	Cash Down	Cash Down	Cash Down
0.00520	24	0.64	1,750.00	2,750.00	3,750.00
0.00520	36	0.58	1,509.16	1,458.90	1,409.70
0.00520	48	0.49	1,272.86	1,238.60	1,204.53
			1,178.96	1,152.27	1,125.58

RB LTV **DCF IF**

Up Front: 1,750.00  
Residual: 39,900.80

Annual Mileage: 7500 | MSRP: 62,345.00

Comments:

### Price

Vehicle: 60,345.00  
Add Ons: 899.00  
Discount: RB 0.00  
Net Price: 61,244.00  
Fees: 1,880.01  
Rebate: 0.00  
Trade Allow: 4,500.00  
New Off: 3,000.00

### Cost

Vehicle: 57,418.46  
Add Ons: 0.00  
Dealer Cash: 0.00  
Trade ACV: 8,000.00

https://eleadcrm.com/ - Inception Fees - Internet Explorer

☒ Accept

First Payment:	1,509.16
Security Deposit:	0.00
Non Cap Cost Total:	586.01
Total Inception Fees:	2,095.17
Cash Paid By Customer:	1,750.00
Cash Applied To Cap Cost:	1,154.83

### Fees / BackEnds / Taxes

Fees  
Back Ends  
Sales Tax  
Not Included In Cap Cost

Inception fees are the monies due at signing of a Lease, which generally include the following: (First Payment + Security Deposit + Cash Down + Non Cap Fees). Along with the items listed, Back Ends and Sales Tax could also be included in the Inception Fees. The 'IF' button also allows the User to edit the [Fees](#), [Back Ends](#), and [Sales Tax](#) (through hyper-links) values that are Not Included in the Cap Cost.

# Deal Comparison

[Save](#) | ☒ [Print a worksheet](#) | [Cost](#) | [Invoice Plus](#) | [Reset Prices](#) | [History](#) | **[Compare](#)** | [Help](#) | [Reload](#)

● [Customer](#) Dominick Testinglead  
● [Trade In\(s\)](#) 2004 Chevrolet Impala Police 4dr Sedan  
● [Vehicle](#) 2015 Mercedes-Benz GLA-Class Base GLA45 AMG 4dr All-wheel Drive 4MATIC  
 Trim: [Base GLA45 AMG 4dr All-wheel Drive 4MATIC](#)  
 Vehicle Age: 122 Miles:

[Credit](#) [App](#) [Score](#)   
[Find Stock](#)   
[Status](#)   
[eRetail Incentives](#)

[Loan](#) [Cash](#) [Balloon](#) [Lease](#)

### Estimated Payments

Lender: [Mercedes Benz Financial](#)

Rate	Term	Cash Down	Cash Down	Cash Down
<input type="text" value="9.99"/>	<input type="text" value="24"/>	<input type="text" value="1,750.00"/>	<input type="text" value="2,750.00"/>	<input type="text" value="3,750.00"/>
<input type="text" value="9.99"/>	<input type="text" value="36"/>	<input type="text" value="2,917.27"/>	<input type="text" value="2,870.78"/>	<input type="text" value="2,824.28"/>
<input type="text" value="9.99"/>	<input type="text" value="48"/>	<input type="text" value="2,039.83"/>	<input type="text" value="2,007.32"/>	<input type="text" value="1,974.81"/>
<input type="text" value="9.99"/>	<input type="text" value="48"/>	<input type="text" value="1,603.27"/>	<input type="text" value="1,577.72"/>	<input type="text" value="1,552.17"/>

[RB](#) [LTV](#) [Rates](#) Program Name:

Amount Financed:			
<input type="text" value="62,747.72"/>	<input type="text" value="110"/>	<input type="text" value="61,747.72"/>	<input type="text" value="107"/>

Days 1st Pymt:  Basis of Carry: [Invoice](#)

### Price

Vehicle:   
[Add Ons:](#)   
 Discount: [RB](#)   
 Net Price:   
[Fees:](#)   
 Rebate:   
 Trade Allow:   
 Pay Off:   
 Net Trade:   
[Back Ends:](#)   
[Sales Tax:](#)

Balance: [RB](#)   
 Front Gross: [RB](#)   
 Back Gross:   
 Total Gross:

### Cost

<input type="text" value="57,418.46"/>	
<input type="text" value="0.00"/>	
<input type="text" value="0.00"/>	Dealer Cash
<input type="text" value="8,000.00"/>	Trade ACV
<input type="text" value="0.00"/>	
<input type="text" value="0.00"/>	
<input type="text" value="0.00"/>	Deposit
<input type="text" value="0.00"/>	Hold Back
<input type="text" value="7.99"/>	Buy Rate
<input type="text" value="25.00"/>	% Bank Resrv.

Comments:

eDesk allows the ability to Compare Deals without having to start another Quote. Once the Deal is initially Saved, the Compare button will become available.

# Deal Comparison

The screenshot displays the 'Compare' pop-up window in the eLeadCRM system. The window is titled 'https://eleadcrm.com/?IDealID=183307161&PersonID=142477438&compare=1&comparepaytype=715 - COMP - Internet Explorer'. It features a navigation bar with options like 'Save', 'Print a worksheet', 'Cost', 'Invoice Plus', 'Reset Prices', 'History', 'Compare', 'Help', and 'Reload'. The 'Compare' button is highlighted with a red circle. The main content area is divided into several sections:

- Customer Information:** Dominick Testinglead, 2004 Chevrolet Impala Police 4dr Sedan.
- Vehicle Information:** 2015 Mercedes-Benz GLA-Class Base GLA45 AMG 4dr All-wheel Drive 4MATIC. Trim: Base GLA45 AMG 4dr All-wheel Drive 4MATIC. Vehicle Age: 122, Miles: 9.
- Estimated Payments:** A table showing payment options for different terms (24, 36, 48 months) and rates (0.00520, 0.00520, 0.00520). The 'Compare' button is highlighted with a red circle.
- Price and Cost:** Vehicle: 60,345.00, Add Ons: 899.00, Net Price: 61,244.00, Fees: 1,880.01, Rebate: 0.00, Trade Allow: 4,500.00, Pay Off: 3,000.00, Net Trade: 1,500.00, Back Ends: 0.00, Sales Tax: 41.94.
- Comments:** A text area for additional notes.

The Comparison Quote allows you to change all aspects of the Deal to include recalling a different Vehicle from Inventory. (In the example above, we have entered a new vehicle in the 'Compare' pop-up. eDesk has the option of presenting the Original Quote and the Comparison Quote via the Show Comparison Form option, as seen on the following page. We can also compare a lease special with loan options on the same vehicle.

# Deal Comparison Worksheet

http://www99.eleadcrm.com/?fromquote=1&...

**Tom Williams Lexus**      Date: 07/10/2012  
Salesperson: Craig Curlette  
Manager: Buz Boyd

FOR INTERNAL USE ONLY

---

Customer: *Larry Edesk    Dani Edesk*      Home Phone: \_\_\_\_\_  
Address: *213 Main*      Work Phone: \_\_\_\_\_  
*IRONDALE, AL 35210*      *JEFFERSON CO*  
E-Mail: *kohlleben@hotmail.com*      Cell Phone: *(229) 630-3707*

---

Original		Comparison																																	
Vehicle Wanted: 2012 Lexus IS 350 Trade Vehicle: 2004 Chevrolet Impala		Vehicle Wanted: 2012 Lexus IS 350 Trade Vehicle: 2004 Chevrolet Impala																																	
Price:	40,813.00	Price:	54,507.00																																
Add Ons:	259.00																																		
Trade Allowance:	2,000.00	Trade Allowance:	2,000.00																																
Trade Payoff:		Trade Payoff:																																	
<table border="1"><thead><tr><th colspan="2">Loan Payments</th><th colspan="2">Estimated - COMPARE</th></tr></thead><tbody><tr><td>Cash Down</td><td></td><td>2,000</td><td>6,000</td></tr><tr><td>48 Months / 2.9%</td><td>865</td><td>776</td><td></td></tr><tr><td>60 Months / 2.9%</td><td>702</td><td>630</td><td></td></tr></tbody></table>		Loan Payments		Estimated - COMPARE		Cash Down		2,000	6,000	48 Months / 2.9%	865	776		60 Months / 2.9%	702	630		<table border="1"><thead><tr><th colspan="2">Loan Payments</th><th colspan="2">Estimated - COMPARE</th></tr></thead><tbody><tr><td>Cash Down</td><td></td><td>2,000</td><td>4,000</td></tr><tr><td>48 Months / 2.9%</td><td>1,173</td><td>1,129</td><td></td></tr><tr><td>60 Months / 2.9%</td><td>952</td><td>916</td><td></td></tr></tbody></table>		Loan Payments		Estimated - COMPARE		Cash Down		2,000	4,000	48 Months / 2.9%	1,173	1,129		60 Months / 2.9%	952	916	
Loan Payments		Estimated - COMPARE																																	
Cash Down		2,000	6,000																																
48 Months / 2.9%	865	776																																	
60 Months / 2.9%	702	630																																	
Loan Payments		Estimated - COMPARE																																	
Cash Down		2,000	4,000																																
48 Months / 2.9%	1,173	1,129																																	
60 Months / 2.9%	952	916																																	
* Estimated A.P.R. Subject to equity and credit requirements.		* Estimated A.P.R. Subject to equity and credit requirements.																																	

The Quotes appear side by side on a single use worksheet. This worksheet is a system tool and not editable or customizable. It's used to simply show a side by side comparison of two deals.

# Post Deal to F&I

The top screenshot shows the eleadcrm.com interface with a confirmation dialog box. The dialog box contains the text: "This deal will now be Posted to your DMS. Do you want this customer's deal marked as sold?". Below the text are two buttons: "Set Opportunity Sold" and "Leave Opportunity Open".

The bottom screenshot shows the same interface with an error message. The error message is titled "Posting to DMS" and contains the following text: "Progress: Searching for customer in DMS. Not Authorized. There is an error in XML document (1, 2). Cannot continue until above issue is resolved. Initiating deal save workflow. Mapping deal information to DMS format. Building deal interface request. Serializing data. Saving deal to DMS. Not Authorized".

When the user wants to post the deal to ADP F&I, The user reviews the information, clicks on the payment /terms the customer has agreed upon (it will be highlighted in Yellow) and click the Post to F&I button on the top right of the Quote screen.

# Post Deal to F&I

This deal will now be Posted to your DMS.

Do you want this customer's deal marked as sold?


Please Read the Pop-Up.

The screenshot shows the eLeadCRM application window. The top menu bar includes 'Save', 'Print a worksheet', 'Cost', 'Invoice Plus', 'Reset Prices', 'Post to FI', 'History', 'Compare', and 'Help'. The 'Post to FI' button is circled in red. The main window displays a 'Posting to DMS' progress dialog with the following text: 'Starting DMS Sync Process...', 'Determining required change to DMS for inventory vehicle', 'Updating vehicle in DMS', 'Vehicle has been successfully saved to the DMS.', 'Determining required change to DMS for customer(s)', and 'Retrieving customer details from the DMS (lookup)'. To the right of the progress dialog is a 'Cost' summary table.

Cost	
813.00	43,087.01
259.00	24.00
808.00	
0.00	
0.00	0.00 Dealer Cash
0.00	2,000.00 Trade ACV
0.00	
0.00	
483.86	
061.86	
239.01	879.00 Hold Back
205.70	7.99 Buy Rate
244.71	25.00 % Bank Reserve

Below the main window is a CRM log table:

Time	Status	Action	Details
1:26 PM	<input checked="" type="checkbox"/>		CRM Sold
Out: 7/16/2012 1:28 PM	<input checked="" type="checkbox"/>		Phone / Repeat-Previous Cust
In: 7/16/2012 2:26 PM	<input checked="" type="checkbox"/>		Edesk, Larry (DMSID: 66637)
Out: 7/16/2012 11:59 PM	<input type="checkbox"/>		New
	<input checked="" type="checkbox"/>		Showroom / drive by
			kohlieber@hotmail.com

Once the post is initiated and complete (2-5 seconds) The ADP Deal Number will be shown on the Quote Screen and the Sharpie has a 'QP'  (Quote Posted) with the Deal ID on the Desk log next to the Customer name. In this example DID: 66637

# Blank Intentionally