



VUE

SALES PROPOSALS USER PROCEDURE

OverVUE

VUE Sales Proposals help expedite the sales process at your dealership. Choose any (or all) of the three proposal types to default to the same starting point for each negotiation during Desking. Edit on the fly to close the deal. Contact Dominion DMS Support to enable the Sales Proposals feature.

Permissions

In Accounting > Maintenance > Employees provide Permissions for Sales > Maintenance > Sales > Proposal Defaults and **[Save]** in the Action Ribbon.

<input checked="" type="checkbox"/>	Proposal Defaults ()			
	Create X	Read ✓	Update ✓	Delete X

Set-Ups

- Navigate to Sales > Maintenance > Sales > Proposal Defaults
- Use the Dropdown on the General tab to select a Default Proposal Type.
- Select the tab associated with your selection.
or
- Select None as the Default Proposal Type and fill out all three tabs.

1. Grid tab

- Down Payment - The amount to be Added-to or Total-to the Scenario Down Payment.
- Down Payment Function - Select either to Add-to or Total-to the Scenario Down Payment.
- Term - Input the Payment Terms in months. This entry overrides the Term used in the Desk/Deal Scenario.
- Term Function - Choose to Add-to or Total-to the Term on the Desk or Deal Scenario.
- Payment Range - Enter the dollar amount of variance to be Added to the Payment. If the Payment Range is set to "20" and the Payment is \$525, then "\$525 - \$545" is displayed.
- Print By - Use the dropdown to select either Sales Manager, F&I Manager, or Salesperson.
- Print VIN and or Print MSRP - Select Yes or No.
- Proposal Disclaimer - Input a disclaimer to print on every Grid proposal.

Click **[Save]** in the Action Ribbon.

	Option 1	Option 2	Option 3	Option 4												
Down Payment	<input type="text" value="\$100"/>	<input type="text" value="\$200"/>	<input type="text" value="\$300"/>	<input type="text" value="\$400"/>												
Down Payment Function	<input checked="" type="radio"/> Additional <input type="radio"/> Total															
Term	<input type="text" value="36"/>	<input type="text" value="48"/>	<input type="text" value="60"/>	<input type="text" value="72"/>												
Term Function	<input type="radio"/> Additional <input checked="" type="radio"/> Total															
Payment Range	<input type="text" value="\$20"/>															
<table border="0"> <tr> <td>Print By</td> <td><input type="text" value="Salesperson"/></td> <td>Proposal Disclaimer</td> <td><input type="text"/></td> </tr> <tr> <td>Print VIN</td> <td><input checked="" type="radio"/> Yes <input type="radio"/> No</td> <td></td> <td></td> </tr> <tr> <td>Print MSRP</td> <td><input type="radio"/> Yes <input checked="" type="radio"/> No</td> <td></td> <td></td> </tr> </table>					Print By	<input type="text" value="Salesperson"/>	Proposal Disclaimer	<input type="text"/>	Print VIN	<input checked="" type="radio"/> Yes <input type="radio"/> No			Print MSRP	<input type="radio"/> Yes <input checked="" type="radio"/> No		
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Print MSRP	<input type="radio"/> Yes <input checked="" type="radio"/> No															

2. Payment tab

- Term - Enter the adjustment to be made to the Term displayed on the Desk/Deal scenario, i.e. to reduce the Term by 12, enter "-12"; to increase the Term by 12, enter "+12."
- Down - Enter the adjustment to be made to the Down Payment displayed on the Desk/Deal scenario, i.e. to reduce the Down Payment by \$500, enter "-500"; to increase the Down Payment by \$500, enter "+500." This field is not available if Compute Down (Payment) is selected/checked.
- Compute Down - This feature is for use in conjunction with Term reduction (a negative number in the Term field). Mark the checkbox to calculate the Down Payment necessary to retain the same Payment amount displayed on the Desk/Deal scenario (See details in the *Payment Proposal* section below).
- Payment Range - Enter the dollar amount of variance to be ADDED to the Payment. If the Payment Range is set to "20" and the Payment is \$525, then "\$525 - \$545" is displayed.
- Print By - Use the dropdown to select either Sales Manager, F&I Manager, or Salesperson.
- Print VIN and or Print MSRP - Select Yes or No.
- Proposal Disclaimer - Input a disclaimer to print on every Payment proposal.

General	Grid	Payment	Four Square
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Click [**Save**] in the Action Ribbon.

	Option 1	Option 2	Option 3
Term	<input type="text" value="48"/>	<input type="text" value="60"/>	<input type="text" value="82"/>
Down	<input type="text" value="\$1000"/>	<input type="text" value="\$2000"/>	<input type="text" value="\$3000"/>
	<input type="checkbox"/> Compute Down	<input type="checkbox"/> Compute Down	<input type="checkbox"/> Compute Down
Payment Range	<input type="text" value="\$5"/>		

Print By	<input type="text" value="Salesperson"/>	Proposal Disclaimer	<input type="text"/>
Print VIN	<input checked="" type="radio"/> Yes <input type="radio"/> No		
Print MSRP	<input type="radio"/> Yes <input checked="" type="radio"/> No		

3. Four-Square tab

- Print By - Use the dropdown to select either Sales Manager, F&I Manager, or Salesperson.
- Print VIN and or Print MSRP - Select Yes or No.
- Proposal Disclaimer - Input a disclaimer to print on every Four-Square proposal.

General	Grid	Payment	Four Square
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Click [**Save**] in the Action Ribbon.

Print By	<input type="text" value="Salesperson"/>	Proposal Disclaimer	<input type="text"/>
Print VIN	<input checked="" type="radio"/> Yes <input type="radio"/> No		
Print MSRP	<input checked="" type="radio"/> Yes <input type="radio"/> No		

Creating A Proposal

- Navigate to Sales > F&I > Sales Desk or Deals.
- Each proposal type applies the entries in the Sales Desk or Deal screen to the Default settings in Sales > Maintenance > Sales > Proposal Defaults.

- *EXAMPLE: If you have the Default Down Payment set to \$500 and Down Payment Function set to Additional, when the amount you enter for Down Payment in the Sales Desk/ Deal scenario is \$1000, the Proposal Down Payment total is \$1500 and then prints that as a Payment Option associated with that down payment.*
- Term and Down Payments are editable in the pop up and the grayed out fields display the results to print.

Within the Sales Desk or in the Deal:

- If defaults are set *None*, click on the **[Proposals]** button in the Action Ribbon.
- If multiple proposal types are available, hover over the **[Proposals]** button in the

Options		Customer Proposal
Term	Down	
		1500
36		\$608-\$628
48		\$462-\$482
60		\$374-\$394
72		\$316-\$336

Grid Proposal

The Grid proposal pop-up provides a simple X/Y grid for comparisons.

Use the default values or edit the:

- Down Payment - Establishes the X-Axis of the Grid Proposal.
- Term - Establishes the Y-Axis of the Grid Proposal.
- Payment Range - Indicates the dollar amount of variance added to the Payment, i.e. if the Payment Range is set to "20" and the Payment in the Scenario is \$525, then \$525 - \$545 prints.
- Click the **[Print]** button.

Four-Square Proposal

The Four-Square Proposal pop-up lets you print a proposal that includes the Trade Allowance, Sales Price, Down Payment (including Rebates), and a Payment. You can adjust the Trade Allowance, Sales Price, Down Payment (including Rebates), and Payment within this pop-up.

- Trade - Imports the Trade Allowance from the selected scenario tab in the Sales Desk or Deal. This amount may be edited; however, no calculations are made.
- Sales Price - Imports the Sales Price from the selected scenario tab. This amount may be edited; however, no calculations are made.
- Down
 - Cash - Imports the Down Payment from the selected scenario tab. This amount may be edited; however, no calculations are made.
 - Rebate - Imports the Rebate from the selected scenario tab. This amount may be edited; however, no calculations are made.
- Payment - Imports the Payment in whole dollar amounts from the selected scenario tab. This field is not directly editable.
- Payment Range - Indicates the dollar amount of variance added to the Payment, i.e. if the Payment Range is set to "20" and the Payment is \$525, then \$525 - \$545 prints.

Click the **[Print]** button.

UAT 1002 Sales Proposal 03/08/2021 2:09 PM

Exclusively for Buyer: Lily Hampton
123 Amethyst Ave
San Clemente, Ca 92673
(949) 333-4444
test@hotmail.com
By: Catherine Agapos

Stock #
VIN
Year
Make
Model
Trim
Mileage 0
Color
Engine Transmission
Adjusted Price \$20,000.00
+ Tax
+ Payoff \$2,500.00

Trade	Sale Price
10000	30000

Cash Down	Payment
1000 Cash 0Rebate	\$622

Four Square Proposal

Trade: \$10000 Sales Price: \$30000

Down: Cash \$1000 Rebate \$0 Payment \$622

Payment Range: 0

Buttons: Defaults, Print, Cancel

Payment Proposal

The Payment Proposal pop-up permits you to make adjustments to the Term and/or Down Payment in the Scenario. The printed proposal shows up to three different payment amounts. Using the default settings, the Payment Proposal also allows you to shorten the length of the Term, and then have the system calculate the Down Payment necessary to retain the Payment amount displayed on the Scenario.

- Print Column checkbox - When selected, the column prints on the proposal.
- Term - Use the default setting or edit as needed. Tab out of the field to pre-view the calculated results before printing.
- Payment - Indicates the Payment or Payment Range in whole dollar amounts. This field is not directly editable.
- Payment Range - Indicates the dollar amount of variance added to the Payment, i.e. if the Payment Range is set to "20" and the Payment in the Scenario is \$525, then \$525 - \$545 prints.

Click the **[Print]** button.

UAT 1002 Sales Proposal 03/08/2021 2:33 PM

Exclusively for Buyer: Lily Hampton
123 Amethyst Ave
San Clemente, Ca 92673
(949) 333-4444
test@hotmail.com
By: Catherine Agapos

Stock #
Year
Make Sales Price \$30,000.00
Model Trade Value \$10,000.00
Trim Rebates \$0.00
Mileage 0 Your Price \$20,000.00
Color + Tax
Engine Transmission + Payoff \$2,500.00

Terms		
48 months	60 months	72 months
2000 down	3000 down	4000 down
\$451-\$456	\$347-\$352	\$278-\$283

This is a Disclaimer for the Payment Proposal.

Lily Hampton Acceptance
Dealer Signature

Payment Proposal

Option 1

Print Column

Term: 48

Down: \$2000

Payment: \$451-\$456

Payment Range: 5

Buttons: Defaults, Print, Cancel

Payment: \$382.52

Total Payments: \$22951.20

Finance Charge: \$1451.20

Compute Down Payment = Yes

Option 1

Print Column

Term: 48

Down: \$5080

Payment: \$383-\$388

Payment Range: 5