Carroll Tire Online's Quote Functionality

With the latest version of CTO, you can now create quotes for your customers online. This feature allows you to quickly and easily create, store, update, email and manage quotes.

Search for an item

In order to add an item to quote, you will need to first search for it. You can use the advanced search, or you can simply use the quick search feature on the right of the page. Once you see your search results, enter the quantity in the corresponding box to the item you would like to prepare a quote for.

Instead of clicking "Add to Cart" click the button to its right, "Add to Quote" directly above the search results. At this point, you can either add this item to a new quote or add it to an existing quote. By default the quote will use the retail price for the tire you have selected. You may edit the price displayed if needed.

Adding an Item to a New Quote

Click the "Create New Quote" button; you will land on the New Quote page. Enter in the customer's information: First Name, Last Name, and Phone Number. You will be able to search for this information in the future.

You can update all of the text fields. You can edit price, quantity, you can even add or remove items at this point. To remove an item, click the "x" to the right of its price. To add an item, type the product information into the text box with the current value "enter additional item here…", add its price, and quantity, then click "Add" – the button immediately to right.

Item Description	Item Price	Qty	Item Total	Taxable	
Sumic GT-A 5514010 - 2157015	82.94	2	165.88	☑	x
Balance	40.00	2	80.00	☑	x
				☑	Add

Adding an Item to an Existing Quote

To add an item to an existing quote, search for the quote you would like to modify on the Add to Quote page. You can search for quotes in a specific date range, by the quote number, or by customer name.

For our example, we will add an item to a quote made in the last week for the customer Jimmy Jones. Once you have found the quote that you would like to add the new item to, click the "Select" Button

You may update all of the text fields. You are able to edit price, quantity, you can even add or remove items at this point. To remove an item, click the "x" to the right of its price. To add an item, type the product information into the text box with the current value "enter additional item here…", add its price, and quantity, then click "Add" – the button immediately to right.

Item Description	Item Price	Qty	Item Total	Taxable	
Yoko Avid H4S/V4S 31502 - 2054017	72.05	4	288.20	☑	X
Triangle Sceptor G/P 326R SP-04 - 2054017	77.87	4	311.48	☐	X
Valve Stem	2.95	4	11.80	☑	X
Disposal-Old Tire	3.50	3	10.50	☑	X
Mount and Balance	10.95	4		☑	Add

Managing Your Quote

Underneath the quote total there are several powerful actions available. You can email your quote, you can print the quote from a PDF, you can update/save the quote for a limited time, you can add the quote to your cart to order, or you can delete the quote entirely.

This quote is valid for [12] Days [☐]   Total Tax: $41.14
Total Installed Price: $697.06

Email Quote | View as PDF / Print Quote | Update/Save Quote | Add to Cart | Delete Quote
(1)   (2)   (3)   (4)   (5)

1. In order to email this quote to a customer or other recipient, click the "Email Quote" button underneath the total price. You will be prompted for the recipient's email address. Once entered, click "send". **In some cases the customer's email filters might place this email in their junk folder so remember to mention that so that they know to check there as well. The emails are sent with a generic "from" address which is: no-reply@tirequotetogo.com**
2. To print this quote, or view it as a PDF, click the "View as PDF/Print Quote". It will open in Adobe Acrobat Reader. At this point, you can print the quote.
3. Once you have made an edit to an item in the cart, you will need to click the "Update/Save Button" in order for it to update. Once you have clicked this button, the updated quote is stored, and can be retrieved at a later time through a search.
4. You can add the tires in your quote to your store's cart to order them from Carroll Tire. Click the "Add to Cart" button, and proceed into Checkout as you normally would.
5. Finally, you will be able to delete a quote from this page, just like you would be able to from the Quote search results page.

The expiration date for your quote is customizable per quote. In order to change the expiration date from the default, enter the number of days the quote is valid for in the textbox immediately above the "email" button. You can then use the drop down box to change between days, weeks, or months.

Searching for a Quote

To search your existing quotes, click on the "Quote" navigation button. At this point, you will be prompted to enter the criteria for your search. For this example, we'll search for our customer, Jimmy Jones. You can search for a quote based on a specific date range, quote #, or customer name. When searching for a quote by customer name, you must search by either first of last name, but not both.

Enter in the criteria, then click "Search Quotes". You should now see a list of all relevant quotes. If the quote you are looking for does not appear in here, you can try the other options for searching – date range or quote #. It is possible, however, that a user may have forgotten to Update/Save the Quote while they were working on it.

You can view this quote by clicking the "Select" button. Once selected, you will be taken to the quote's page, where you can manage, update, edit, etc. If you no longer need this quote, you can delete it by clicking on the red "x" button to the right of the Date.

Adjusting Your Preferences

In the header of the Carroll Tire Online ordering system, you will find a control panel that allows you to access the preferences of your user experience. The "Preferences" link will allow you to adjust the image used on quotes, default service charges, tax information, etc.
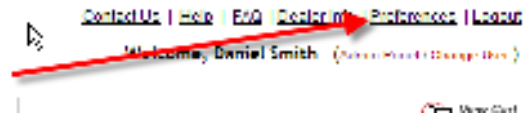
If, after clicking on the "Preferences" link you do not see "Company Preferences" at the bottom of this page, you may not have access to change these settings. Please contact the individual who set up your CTO access for configuration. If you don't know who that person is, contact the HelpDesk at (800) 344-7029.

THE EASIEST WAY TO ORDER

ContactUs | Help | FAQ | Dealer Info | Preferences | Logout

Welcome, AAA Tire Solutions

TIRES | WHEELS | RIMS | ACCESSORIES | QUOTES | ORDER HISTORY | PROMOTIONS

View Cart
Check Out
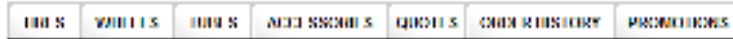
Once you've clicked the "Preferences" link, select the "Change Quote Settings" link (under Company Preferences). Here you will be able to edit the default options for one store at a time or make a change across the board to all of your locations. Using the preferences tab, you will be able to change your company logo, tax rate, assumed add-on services for new tires, as well as your default quote settings.

When making adjustments to the "Preferences" section of Carroll Tire Online, it's important to note that if you don't click save after all of your adjustments have been completed, they will not be stored on the system. It is also important to remember that as these are your default options, they will appear on every quote you create from that point forward.

By default the quote tool will use the "retail price" for any tire selected. In order to adjust "retail prices" for tires click on the Preferences tab.

THE EASIEST WAY TO ORDER

ContactUs | Help | FAQ | Dealer Info | Preferences | Logout

Welcome, Daniel Smith

View Cart

Once on the Preferences page select the Change Retail Pricing Markup link and edit the pricing. You may also edit the retail price displayed in the quote itself if any adjustments are needed.
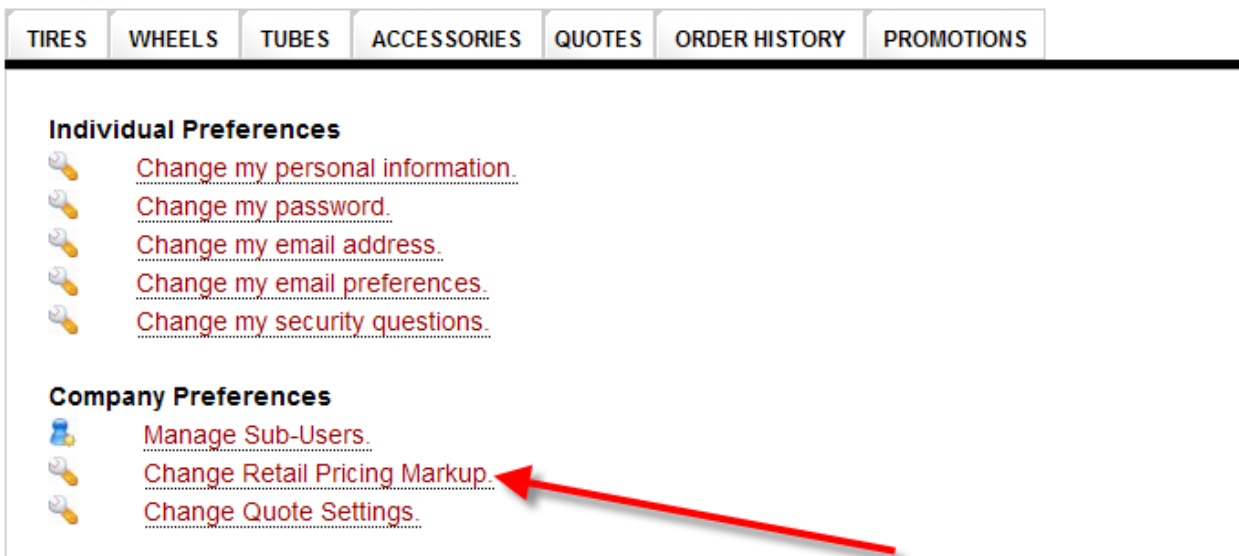
Selecting the Location to Edit *(For Customers with Multiple Store Locations Set up with Carroll Tire)*
When editing in the CTO preferences tab, you can edit an individual location, or you may decide that you would like to apply a specific change to all locations. To make a change to all locations, all you need to do is check the "Apply to all Locations" box at the end of each information pane detailed below. To edit an individual location, use the drop down at the top left of the "Quote Configuration" page.

Adjusting Your Business' Logo
To change your company logo, simply "Click to Expand" the info pane, then click the browse button to upload an image from your computer. You can check "Apply Logo to All Locations" if you own multiple stores under the same branding.

Your business's logo will only appear on the print-ready PDF Quote. When you click the "View as PDF / Print Quote" Button, a PDF will be created including all of the information from the quote with the logo.

Adjusting your Tax Rate

To adjust the default tax rate, you will do the same as the logo pane. Open the pane up, and edit the open text boxes. You can choose to use percentage or flat dollar tax rate. In addition, you can add additional specific taxes as a default here. If you need to, you can delete a tax rate you have added by clicking the red "x" directly to the right of the dollar radio button. Again, like the logo pane, you can apply this rule to all of your locations if you own multiple locations.
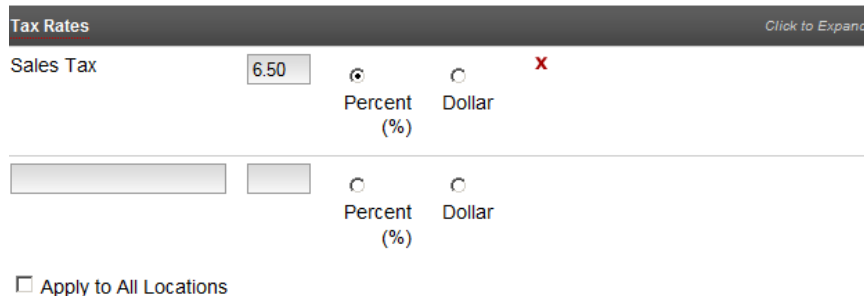
Adjusting Add-on Charges for Service Quotes

When compiling quotes, you can automatically have the quote system tack on necessary service charges such as wheel balancing, wheel alignment, etc. To do so, expand the "Add-ons" pane, and change the open textboxes, or create a new item by filling in the empty textbox on the bottom. Like all the other panes, you can remove an item by clicking the red "x" and you can "Apply Add-Ons to all Locations".

Add-ons				Click to Expand
	Item Price	Qty	Taxable	
Disposal - Old Tire	10.00	3	☑	✗
Install Service	10.00	4	☑	✗
Mount and Balance	1.00	4	☑	✗

Adjusting Quote Expiration Information

As detailed earlier when creating quotes, you have the ability to adjust the quote's period of validity. Under the Expiration Information pane, you will be able to adjust the default options to

1. Display the quote information on print-outs as the default
2. The default length a quote is valid for
3. Whether or not to apply the same quote information across all of your locations.

Printable Quote Layout

Your printable quote will include a multitude of important information: everything the customer – and you – will need to resume the sale at the next visit.

Your logo will appear in the top left corner, along with your business's location and address. In addition, the quote will include its quote number, customer first and last name, customer phone number, as well as the date it was created to help you identify this specific quote later.

You and your customer will be able to see all of the items and their pricing involved in generating the quote including the item and any additional services. The more prominent items will have a collection of data necessary, such as vendor, product number, UTQG information, etc. In addition, the total for taxes and any other additional surcharges will be automatically added after the subtotal is calculated.

If you checked the "Display quote expiration information on print-out" box before you clicked the "View as PDF/ Print Quote" button, your quote will have that information at the bottom of the document. In our example, the quote is only valid for 12 days.

The system will automatically delete quotes that are older than three months old. In order to keep quotes longer than three months, we recommend that you store them as electronic PDF files by using the "Print/View as PDF" button