How to send a custom offer

Why would I send a custom offer?

Creating a new offer is a great way to keep current prospects engaged and to try and reconnect with a cold lead. Some of the best situations to send a custom offer include:

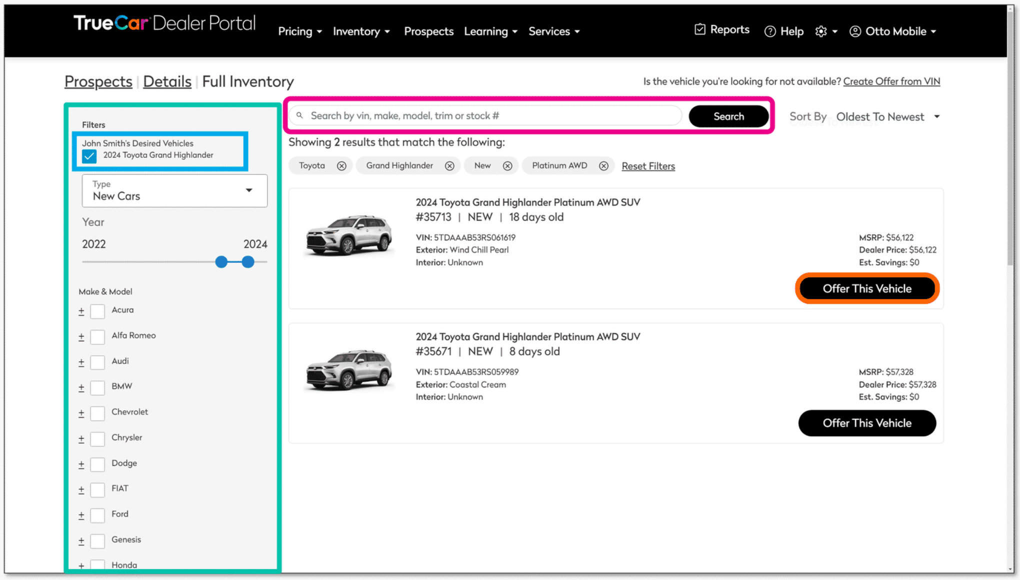
- **After you speak with the customer and identify a vehicle that better fits their wants or needs**
- **If the original vehicle the customer prospected on is no longer available**
- **Offering a used vehicle to a customer that submitted a lead on a new vehicle and vice versa**
- **Attempt to re-engage a customer**

1 Step 1: Select a vehicle

By default, we will show vehicles that closely match the criteria of the original vehicle. If you want to offer another vehicle, **unselect the box in the top left**.

From there you can use the filters on the left, or even search for a specific VIN, make, model, trim, or stock#.

Once you have the right vehicle, you'll click '**Offer This Vehicle**' to proceed.



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Step 2: Cash offer accessories and rebates

On this next page, you'll be able to customize the offer for your customer.

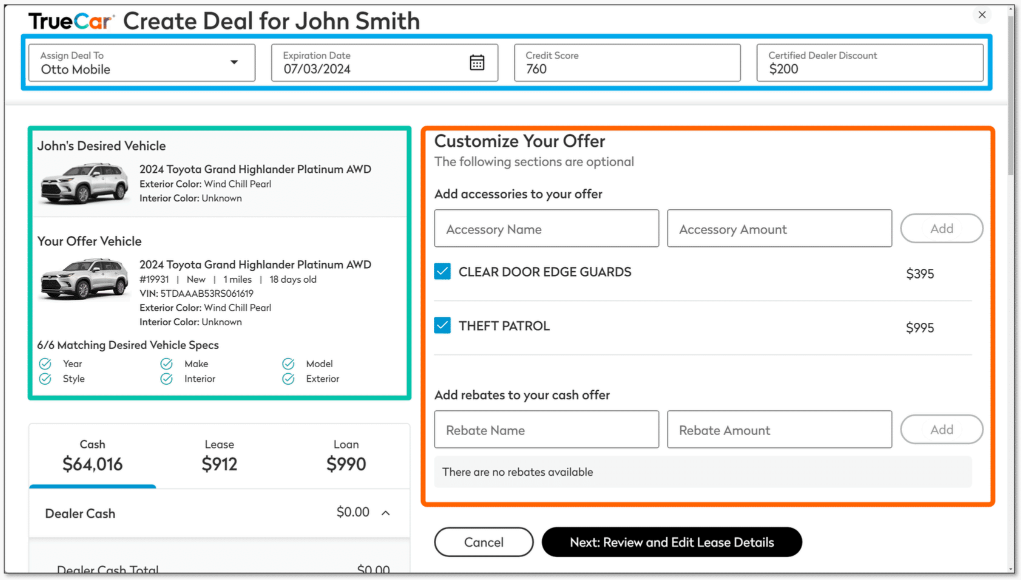
First, you can **see how closely the new vehicle matches** the originally prospected vehicle.

Then, make sure you have the **details at the top filled out**.

Now you can **customize the accessories and rebates**.

Please note any accessories here will be carried over into the loan and lease calculations.

The rebate input here will only apply to a cash deal. We'll have an opportunity to apply rebates for a lease and loan in our next steps.



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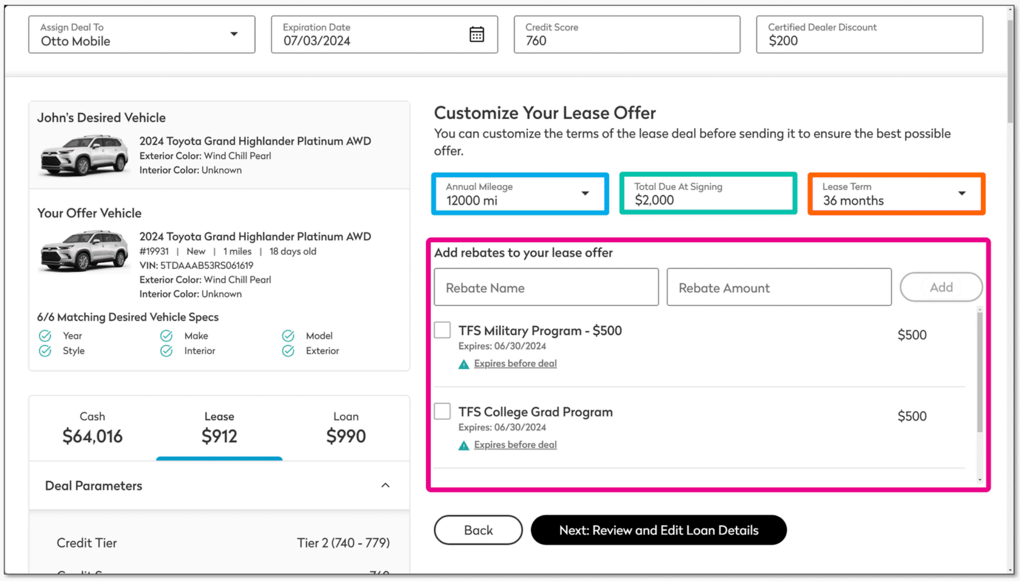
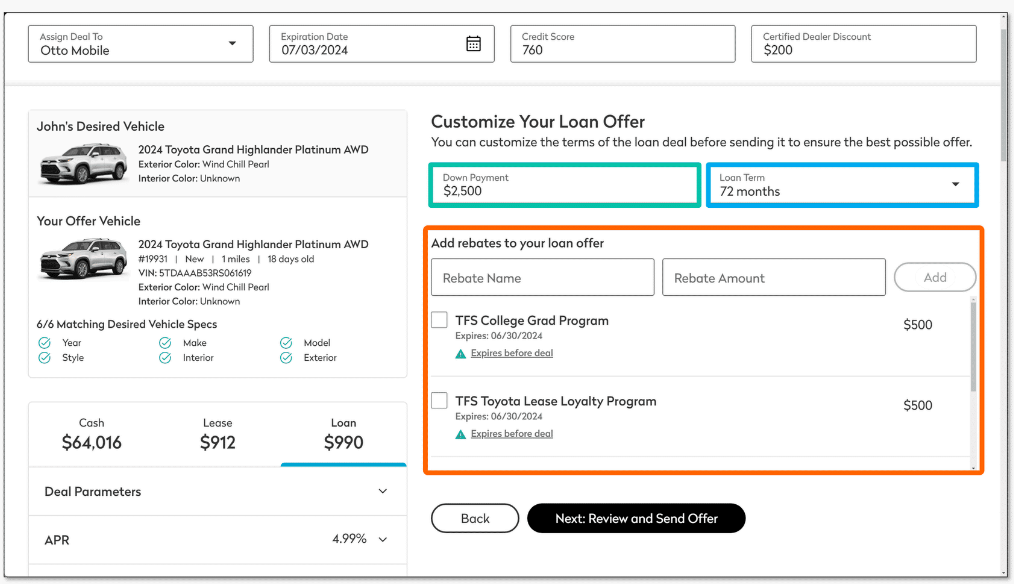
3 Step 3: Lease offer

For our lease customization, you can change the Annual Mileage, Total Due At Signing, Lease Term and add any existing and custom rebates.



4 Step 4: Loan offer

For our loan customization, you can change the Down Payment, Loan Term, and add any existing and custom rebates.



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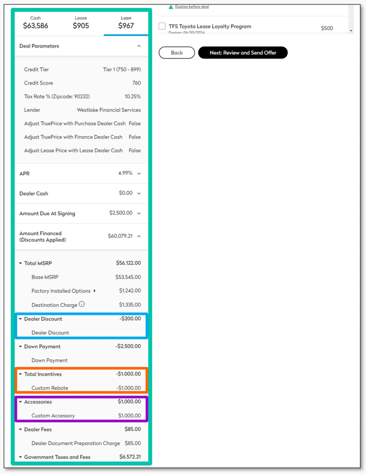
5 Step 5: Details

As you progress through this process, the bottom left section will update the deal with any changes you have made along the way. This will allow you to ensure the deal is accurate before you send it off to the customer.

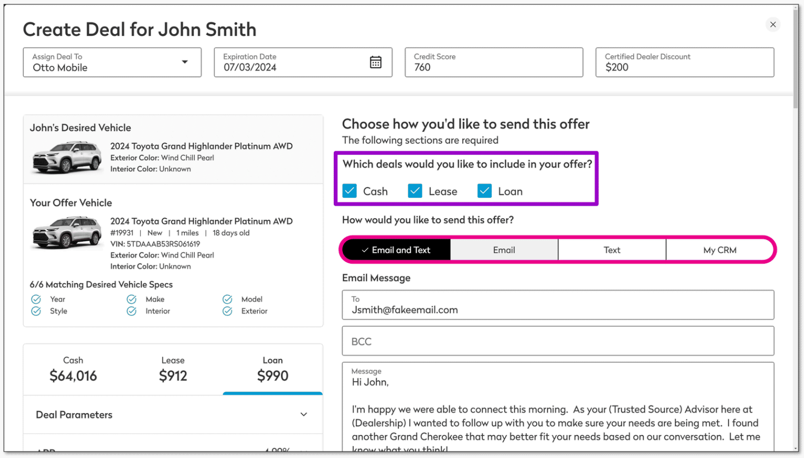


6 Step 6: Send the new offer

Now that you've customized your offer, you're ready to go!

You can select which deals you want to include in your offer.

Then you can send it to your customer via email and/or text, or even select My CRM where you can copy, then paste the information into your CRM.



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Review the offer

Once you send the offer you'll have access to a version for your dealership with the additional details shown to you that won't be shown to the customer. Clicking '**Print quote**' will allow you to preview what the customer will see.

Don't forget to lead with the trusted source! The **logo in the top left** will match which trusted source the customer submitted a lead from. In the example, the lead was submitted directly from TrueCar.