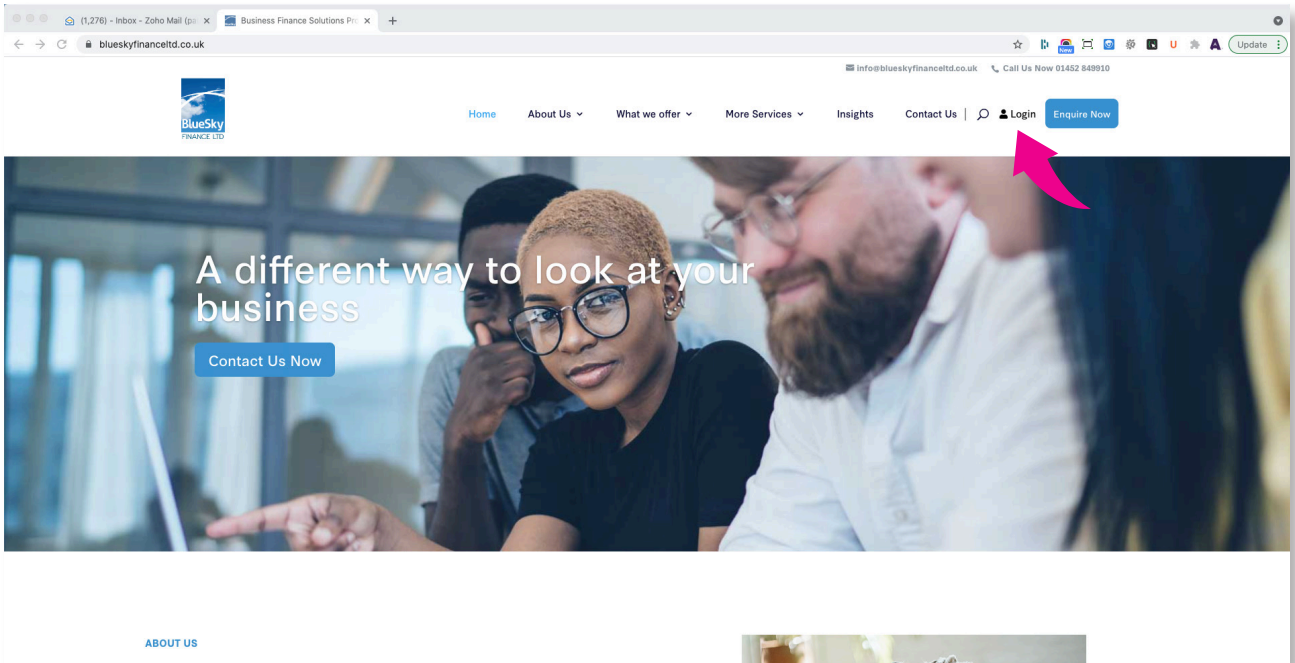




QUOTATION TOOL USER GUIDE



1

On the Blue Sky Finance website <https://blueskyfinanceltd.co.uk>
Click on the **Login** link.

Username or Email Address

Password

☐ Remember Me

[Lost your password?](#)
[Go to Blue Sky Finance Ltd](#)



2

Login with your company details.
You will now be on your company account page. If you wish to personalise the quotation with the sales-persons name, you can change them here.

My Account

Name

First Name

Last Name

Company Information

ACME ANVILS

>YOUR COMPANY<
[Upload image](#)

Company Name

Address

Postcode

City/Town

Country

Website

Contact Information

Email Address

Blue Sky Finance Ltd

My Account

Quotation Tool

History

Collapse menu

Set up a quote

Client information

Full Name: Wile E. Coyote

Address: Desert Road

Postcode:

City/Town:

Country:

Email:

Phone:

Website:

Company logo

Upload image

Quotation

Asset Description

B I [Formatting icons]

3

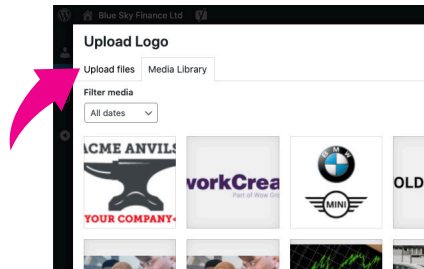
Select **Quotation Tool** from the left menu, and fill in all your customer's details.

A nice detail is to add the customer's logo if available. You can usually click & drag a copy of it from their website onto your desktop.



4

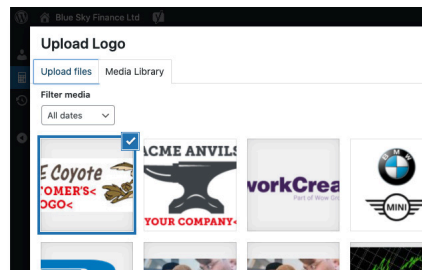
If you click the **Upload image** link, you will be taken to a Media Library, here select the **Upload files** tab.



5

Drag the customer's logo into the file window or use the **Select File** browser.

When it uploads, select it and click the Blue **SELECT** button at the bottom-right of the screen.



Blue Sky Finance Ltd

Website

Company logo

Wile E Coyote

Upload image

Quotation

Asset Description

2 ton iron anvil for dropping

Colour: black

Note

Delivery notes or other information here

Capital Value

£14750

Calculate

Term

	2 Years	3 Years	4 Years	5 Years
Yearly	£ 7911.90	£ 5456.91	£ 3492.21	£ 291.02
Amount/Year	£ 659.33	£ 454.74	£ 291.02	£ 17461.05
Amount/Month	£ 15623.80	£ 16370.73		
Finance Value				

6

With the *optional* logo in-place, complete the asset description, sales notes and value.

Click **Calculate**.

You may select and deselect the term years as appropriate.

When complete, click the **Generate a Quote** button at the bottom.

Your History					
Export History			<input type="text"/> Search Quotation		
Quote Number	Name	Capital Value	Term	% (Rate/1000)	Date
quote-1230	Wile E. Coyote	£14750	(3 Years, 2 Years, 5 Years)	(44.70, 30.83, 19.73)	Created August 5, 2021 Edit Download View

8

The finished finance quotation is added to your **History** panel with all previous quotations.
From here they can be **Viewed**, **Downloaded** as a PDF, or **Edited** and updated.



9

An example finished quotation with customer's logo, quote number, asset detail, notes, payment terms and conditions added. This is now ready to print or send as an email attachment.

Client Name: Wile E. Coyote

Address: Desert Road

Quote Number: quote-1230

Quote Date: Aug 05, 2021

Amount to Finance: £14750

Asset Description:

2 ton iron anvil for dropping

Colour: black

Note:

Delivery notes or other information here

This covers Lease & HP but on HP you pay all the VAT upfront

3 Years	
Amount per Month	£ 454.74
2 Years	
Amount per Month	£ 659.33
5 Years	
Amount per Month	£ 291.02

- Fixed Rate for duration the agreement
- 130% Super Allowance on HP Sale and Leaseback
- 100% Tax deductible on Lease rental
- Spread the payments to match the life of the Asset

All Payments shown are EXCLUDING VAT, subject to status and final credit approval. All values above are calculated estimates and may differ from the final rates offered. The tax relief available will be subject to your current trading position and we are happy to give general advice but suggest you seek final clarification with your accountant.

WHAT NEXT?

A

Call or email Ben

- Client Name
- Contact details
- Equipment
- Agreed quote and term

B

We do the rest

- Agree Finance
- Sign Paperwork
- Request invoice

C

Multiple payment options including

- Pay prior to delivery
- With deposit
- Stage payments

Ben Wakefield

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