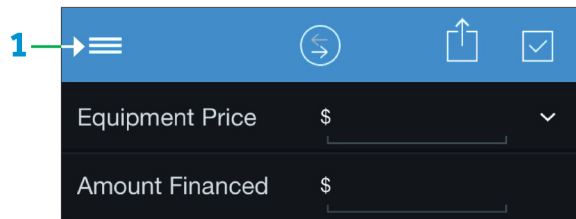


Express Finance Proposal Reference Guide

Step 1

The first step to creating a proposal is to click the triple bars in the top left-hand corner.



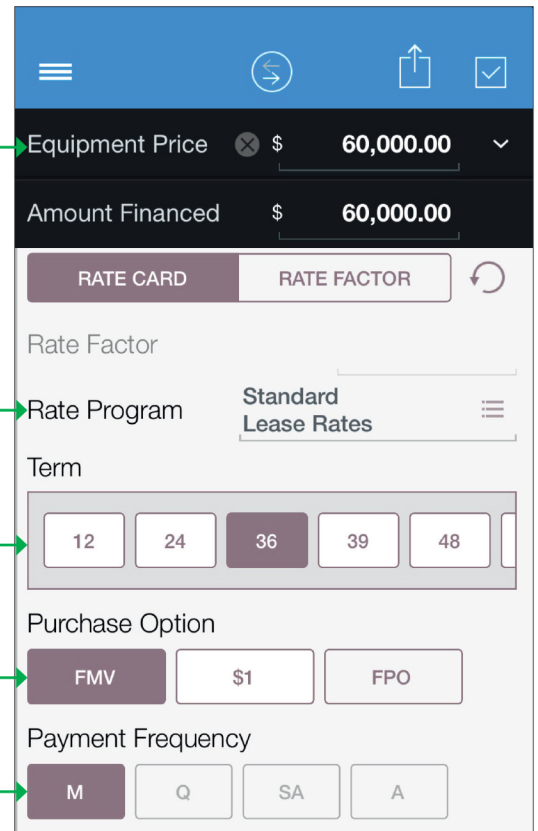
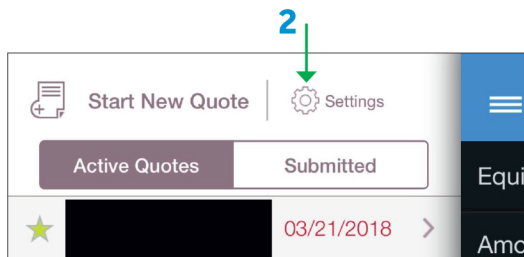
Step 4

Go back to the main screen and input the desired

- 4A** Equipment Price
 - 4B** Rate Program
 - 4C** Term
 - 4D** Purchase Option
 - 4E** Payment Frequency
- etc.

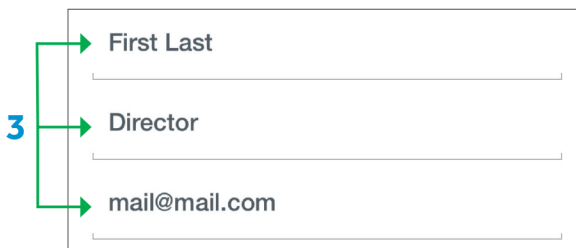
Step 2

Click the settings button in the top right-hand corner.



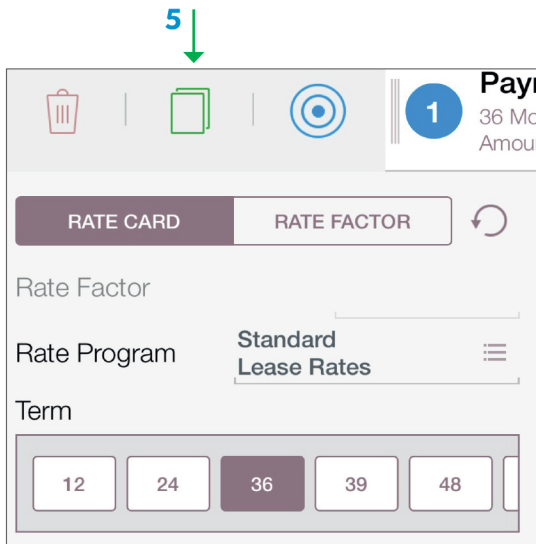
Step 3

Fill in your information in the fields. You only have to do this step once, and then it will be automatically filled for every new proposal you make.



Step 5

To create multiple quotes, swipe to the right on the first quote, and click the double green boxes.



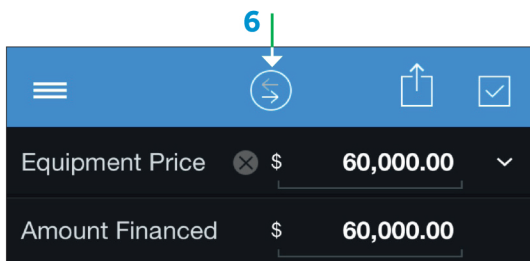
Step 8

Click "Create Proposal"



Step 6:

Once you have your desired options, click the double facing arrows at the top of the screen.

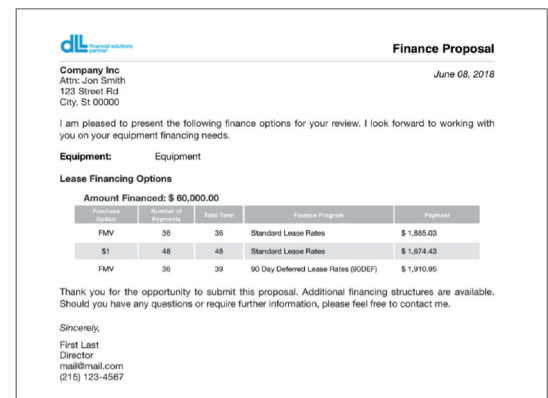


Step 9

9A Add a subject

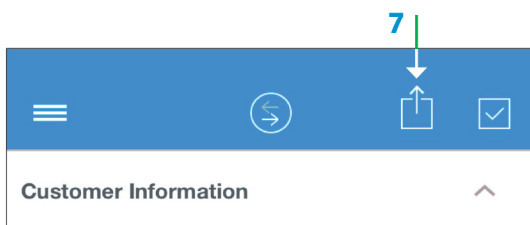
9B Edit the message

9C Click 'Send'



Step 7:

Input all the customer information on this screen. This information should match the company's legal name. Then click the share button.



Contact

www.dllgroup.com

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