**Profee User Guide**

**Logging In**

* Click on the attached link <https://select.elantis.com.au/login.aspx?ReturnUrl=%2f>
* Enter your username and password, click Login



* You’ll will then see the below page



**Quoting**

Click on Quotes, you will then have two options, New Quote or Browse / Find Quotes



* New Quotes is used to create new quotes and produce the contract
* Browse/Find Quotes is used to search on existing quotes

**New Quotes**

To create a new quote click on New Quote, you will then see the below screen



* Complete the following fields in the Quote Details tab
	+ ABN if known
	+ Client Name and Address
	+ Amount, this is the total amount of the invoices
	+ Deposit amount if applicable
	+ Payments, this is the number of monthly instalments
	+ Commission
	+ Settlement Days, this will default to 5 and will be 5 days from when the signed contract is received
	+ First Repayment Date, this will be the date the signed contract is received by us
	+ Invoice Numbers, this is the invoice numbers of what we are funding, use a comma to separate each
* Then go to the Client Details tab and complete all the relevant fields, ie Postal Address, Phone, Mobile, etc.



* Click on Save Quote, a Quote number will now be displayed on the top right hand corner
* Go back to the Quote Details tab and click the Calculate Quote Button on the top



**Printing/emailing a quote**

To print the contract click on the Print Document button on the bottom left hand corner



You will then get the below screen



You can then Print the documents, this creates a PDF which can then be saved or you can click on Email which will then allow you to email it.



A copy of the Final contract is below. It will also print the terms and conditions and the client letter.

