



Contact Uptake Customer Service, 24/7

QUESTIONS? (312) 242-2300
support@uptake.com

At Uptake, we are constantly striving to make our products better for our users. We've been working hard to improve your experience and increase the value Uptake delivers to your business.

As part of the Fall Release, we will be releasing feature enhancements to many of our products. These enhancements have been made available in *Preview* as of Tuesday, October 15th, allowing you to preview the enhancements for one month prior to them being pushed to your *Production* environments. They will be made available in the *Certification* environment on November 19th, and the *Production* environment on November 21st.

Please see the below summary of these exciting enhancements.

+ *Due to prerequisites or default views being off, these features will not be currently available in your environment.*

* *Enhancement was created out of input from the Customer Ideas Portal.*

CLOUDLINK

Application Color Changes

Configurable, Default: *Light Header Theme*



To change the configuration on this to the gray color scheme, please change the **Light Header Theme** config keys in the **Configurator Admin Tool**. If you are running the old navigation in *SalesLink*, the color change will not be impacted.

Note, as of the Winter Release, this will no longer be configurable.



CUSTOMER ORDER TO INVOICE

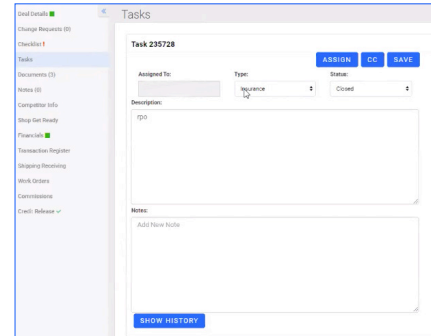
Deal Specific Tasks +

Configurable, Default: *Off*

This feature allows for the creation of multiple tasks per agreement. The **Task** is assigned to one individual with the following information:

- **Type**
- **Status**
- **Description**
- **Notes**

The complete **History** of the task is available and **Reports** can be created and exported to a



To turn this feature on, please submit a ticket to: support@uptake.com

Pending Deals Report +

Configurable, Default: *Off*

This report makes it easier to see deals not completed. Filter by **Sales Manager, Sales Rep, Division, and Deal Details Status.**

| Approved Credit | Docs Out | Docs Back | Approved Finance | S&R | Deal Sheet | Inventory | General Notes |
|-----------------|-----------|-----------|------------------|-------------|----------------|-----------|---------------|
| | Completed | Completed | Completed | Completed | In Progress | Completed | |
| | Completed | Completed | Completed | Completed | In Progress | Completed | |
| | Completed | Completed | Completed | Completed | In Progress | Completed | |
| Completed | | | | Completed | Not Applicable | Completed | |
| | Completed | Completed | Completed | In Progress | In Progress | Completed | |
| | Completed | Completed | Completed | In Progress | In Progress | Completed | |

Checklist Items can be configurable to show on this report with its current status. **General Notes** is a new field in the deal and can also be configured to show on this report.

To turn this feature on, please submit a ticket to: support@uptake.com and provide the checklist that you would like included in the report.

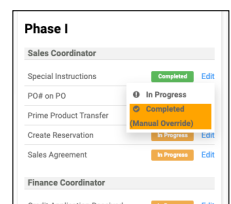
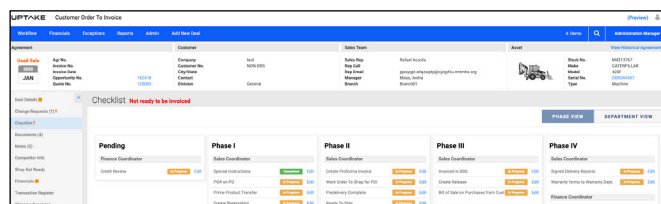
Enable Checklist Override on Deal *

Configurable by role, Default: *On for Admin*

This allows a defined user role to override and check off any items in a deal.

There are instances where an exception occurs and items need to be checked to continue the workflow for the dealer. Checklists can be overwritten.

To change the role permissions, please submit a ticket to: support@uptake.com.





iQUOTE

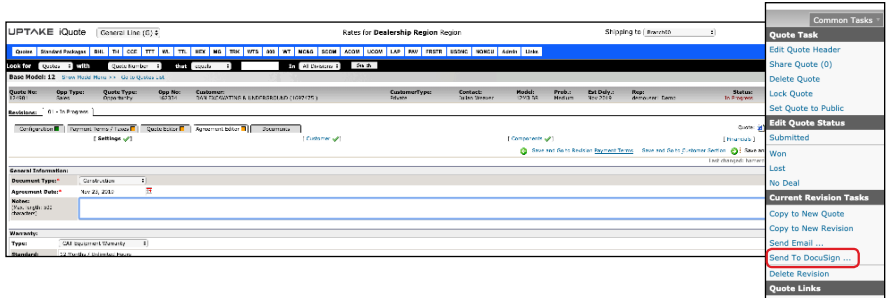
DocuSign Integration +

Configurable, Default: *Off*

All quotes which have been completed in the **Agreement Editor** are available to be sent for electronic signatures to *DocuSign*.

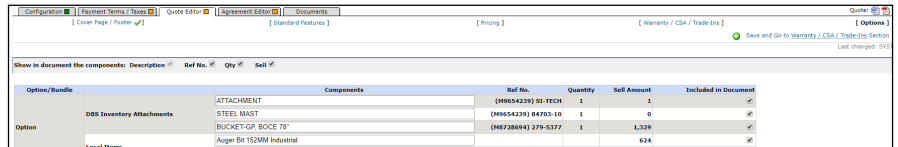
See the supplemental guides “*Getting Started: DocuSign API*” and “*Getting Started: DocuSign for SalesLink*” for more details.

To turn this feature on, please submit a ticket to: support@uptake.com



Edit Options/Bundles in Quote

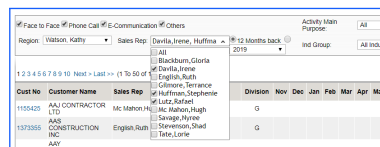
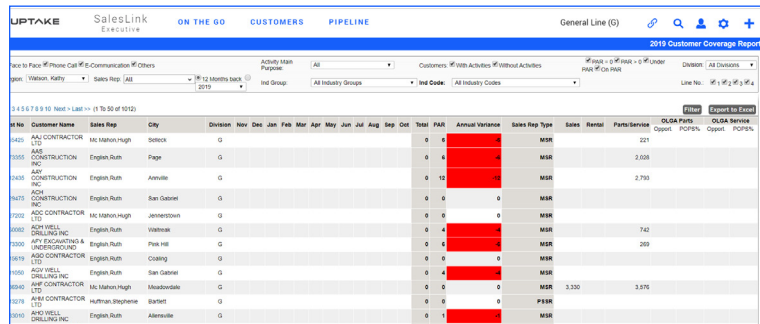
Provides the ability to change the description of the **Option** and **Bundles** added on the *iQuote* document.



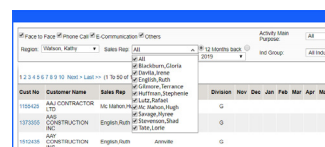
SALESLINK

Updated Manager View of Customer Coverage Report *

Provides the ability to see all of the reps for every customer within a region. The ability to see all customers in a region and their rep assignment enables a better **Export to Excel** report.



The sales rep has an *All* option to view all of the reps in the region in a single report.



Additionally, there is a “multi-select” option for sales reps to see the coverage for all checked reps.

