Sales Operations CSA Quoter

USER GUIDE

Updated June 19, 2019

UPTAKE

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DISCLAIMER

We update CSA Quoter frequently. This user guide will be updated on an ongoing basis and may have slightly outdated content due to the frequency of software updates. Please review the most current version of this guide regularly and with care.

TRADEMARKS

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CUSTOMIZATION

This user guide will show you how to use the CSA Quoter application with the assumption that your dealership has made the migration to CloudLink and your Inventory application has been set up in a standard configuration. However, it should be noted that depending on your dealership's level of customization, or if your dealership hasn't migrated to CloudLink yet, your screens may look slightly different than those shown here.

NOTE: CSA Quoter currently only supports the Google Chrome browser.

CSA QUOTER OVERVIEW

CSA Quoter enables the dealer to create and manage the configuration and pricing of each PM event. The user can create a contract for a single machine, and then group multiple machines together to present a single quote to a customer.

In general there are two types of PM contracts: 1. Preventive Maintenance and 2. A Total Maintenance and Repair.

CSA contracts include a set of PM events that are completed on a scheduled timeline. The schedule can be defined by hours or date periods. PM events are associated to preventive maintenance items such as oil and filter changes, tests and inspections.

CSA Quoter focuses on the quoting of PM contracts for heavy construction. Quoting MARC / TM&R and power system contracts are not currently supported.

CSA Quoter Global Menu

The CSA Quoter global menu allows the user to navigate through the main application functions. The following sections will outline each function.



Home Button

The home button will take the user back to the quote list page



New Quote Button

Clicking the New Quote button will initiate the creation of a new contract. Also new quotes can be created from the Advanced Search function.



Advanced Search

Advanced Search allows the user to search for quotes that already exist using an array of search criteria.

٩	Advanced
---	----------

Advanced Search							
Make:			 Serial No: 			Model/FR Exchange:	
Branch:			 Cost Center: 	Please select a branch	*	Customer:	٩
Originator:			 Owner: 		*	PM Code:	· · · · · · · · · · · · · · · · · · ·
Dates:	2016-06-11	2019-06-11	Limit Quotes to Latest:	50 -			
							O Search th Reset

Personalize Button

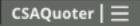
The Personalize Button allows the user to enter in a variety of personal information that is used when creating a quote.

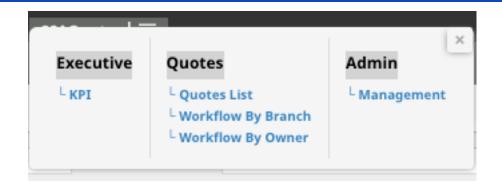
*						
	Personalize					🔚 Save 💍 Reset
	Branch:	- Cost Center:	Phone No:	Mobile Phone No:	Fax No:	
	Default Manager:	Substitute Manager:	v			

CSA Quoter: Main Menu

The main menu is used to navigate the various sections of CSA Quoter, including:

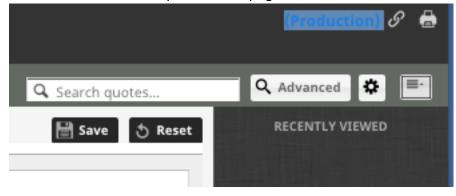
- KPI
 - View of a variety of application metrics
 - Each metric can be drilled into to view the details that contributed the KPI
- Quote List
 - List of existing quotes
 - List can be filtered
- Workflow By Branch
 - Listing of a summary of the number of quote and values by branch
 - The workflow includes drill downs to allow the user to view the details
- Workflow By Owner
 - o Listing of a summary of the number of quotes and values by the quote owner
 - The workflow includes drill down to allow the user to view the details





Last Quotes Viewed

On the right hand side of the main menu, there is a menu item that when pressed will show the most recent quotes that have been accessed by the user. By clicking in the quote information the user is taken to the quote details page.



Application Links

The Application Links takes the use back to the list of all the applications that they have access to.



Print Current Page

The print icon will initiate a print of the current page.



Quote Detail Navigation and Menu

Within the quote itself, there are various icons that are used to provide navigation functionality.

Section Collapse/Expand

Within the quote there are several places that CSA Quoter will allow the user to collapse or expand a section horizontally. This allows the user to hide certain parts of the page to make more room to view other quote data.

••	
•	
_	

QUOTE NO. 20133 (OPEN -)
 Owner
 Originator
 Description

The collapse/expand icon above is used to hide or show the quote top level header information.

^	47	QUOTE	NO. 20133	(OPEN -)
---	----	-------	-----------	-----------

The collapse/expand icon above is used to hide or show the list of equipment.

Quote Tab Menu – Overview

When the user is within a quote, the down arrow on the Overview tab will display navigation and functional options that are related to the quote header.

Ê	Overview 🔻	Revisions:	0	🛐 1 In Progress 👻	
Qu	ote Actions		Qu	ote Status Change	F
ø	Edit Quote H	eader	<i>•</i>	Submitted For Approval	
×	Delete Quote		×	Lost	P
		(Θ	No Deal	

Quote Tab Menu – Revision

When the user is on a quote revision, the down arrow will display a series of navigation and operational functions that are related to the specific quote revision.

🗈 1 In Progress 👻	
Revision Navigation	Revision Actions
Go to Summary	Change Status to Completed
Go to Equipment	Copy To New Revision
o to Documents	Copy To New Quote

Quote Equipment Link

Within a quote revision, each serial number will show a chain icon that will open a page in Equipment Link that will show the equipment related information.

02BK09805	(8)
	\bigcirc
16 Unit No: 4520	
	02BK09805

PM Event Definitions

The diagram and corresponding descriptions outline the source of the PM data and how it is managed within CSA Quoter.

		Quote Header		
	Q	uote Revision(ś)	
		Equipment(s)		
		Quoted Events	5	
Pack	ages	Events Types	Additional Events	Manual Events
	al Event Types & rences	DBS Std Jobs FR Exchange		
Event Types	Additional Events			
DBS Std Jobs FR Exchange				
Legend User Accessible PM Quoter Adm Functions DBS Data				

- Quote Header: Provides all the information about the:
 - Customer Customer location Additional customer information Customer contacts Quote related information Number Owner Description Contract type Branch Cost center

Quote Date

Status of the quote and contract type.

- **Quote Revisions**: A Quote can have unlimited Revisions. Revisions can have separate sets of equipment. This allows revisions to represent a timeline of the quote details or quoting different sets of events to the customer.
- **Equipment:** A quote can consist of one of more pieces of equipment. Equipment can be linked to a serial number or just a model.
- **Quoted Events:** Quote items represent the list of events that have been added to the quote.
- Packages: Packages provide a way to group Events and Additional events together, to
 make quoting common groups easier. When a package is created, it will contain the list
 of events and the number of occurrences that would be included in the package.
 Note: Packages are linked to contract types.
- Event Types: PM events represent a single event that can be included in a quote. An example would be: PM1, PM2 etc. The definition of a PM event is managed within CSA Quoter and this allows a PM event to be linked to a DBS standard job.
 Note: PM events are linked to contract types and assigned to categories.
- **Manual Events:** Manual events are free form events that can be added to a quote for a particular serial number, particular revision and quote.
- **PM/Additional Events & Occurrences:** PM Events/Additional and occurrences defines what is included in a package.
- **DBS Standard Jobs:** DBS standard jobs are loaded from DBS on a nightly basis and can provide a list of parts, labor and misc items related to the various PM events that will be included in the quote. Standard jobs are defined by SMCS codes and are associated to a model and serial number range.
- **FR Exchange:** A Flat Rate Exchange is similar to a standard job, but they are not linked to a specific model and serial number range.
- Additional Events: Additional Events are managed within CSA Quoter and are very similar to Event Types, except they are not linked to standard jobs to determine the price. The price for an Additional Event is set within CSA Quoter and has the option to be set by the user when building the quote.

QUOTE LIST

Overview

View all Quotes created with key headline information related to the quote.

			🛠 Service 🔻 🔠 Admin	iquipment 🛨 🐇	T∧KE ^{⊕ .⁰}	UP
		ter 📃	PSQuoter 📄 CSAQuo	:eLink 📃 🛛 F	Servio	<u> </u>
					ome 💽 New Quote	📤 Ho
Status: 🗹 All						Filters:
Current	Within Three Months 🛛 👻	Last Changed:	All 👻	Changed By:	All -	Owner:
🗹 Open 🗹 Submitted 🗹 Won 🗹 Lost 🗹 No Deal					All 👻	Creator:
Current	Within Three Months 🛛 🔻	Last Changed:	Ali	Changed By:	All	Filters: Owner:

Key Fields

Owner: Who created the Quote

Creator: Who is logged into CSA Quoter.

Last Changed: The last time the quote was modified or the creation date.

Status: Check mark All will choose all filters for Current/ History.

Current: Open: the quote is in Progress.

Submitted: Submitted for Approval.

History: Won: the quote status has been moved to a WON Status.

Lost: the quote status has been moved to a LOST Status.

No Deal: The quote status has been moved to a No Deal Status.

QUOTE HEADER

Overview

Provides all the information about the Customer Location, Finances, Quote Date, Status of the quote and contract type.

👕 Overview 💌 Revisions: 🗈 1 In Progress 📼				* TET CONTRACT
Quote		Customer		Opportunity
Quote Date: 17 May, 2019	Stage:	Customer: TET CONTRACTOR LTD(1056130)	PO Req:	No opportunity has been selected.
Quote Status: Submitted For Approval		PO No: Terms:	Charge(2)	
Contract Type: PM Agreement	CPI: No	Address:		
Description:		27 WEST OLD STREET		
Branch: Branch00				
Cost Center:		City/State: NEW HOPE/IL	ZIP: 25405	
Owner: kablem Demo	Office Phone No:	Phone:		
Mobile Phone	Fax No:	Tax Codes:		
No: Diff. Owner:		Exempt No:		
Comments:		Charge Code: FI3 HW5		
		Prevailing Wage:		
Contact				JI
Name: jolig	Type: Location	Phone: 123456	Mobile:	Email:

Quote Date: The Date the quote was created.

Status: Where in the quoting process is this quote.

Contract Type: Contract types are assigned to each quote header. When a machine is being quoted, the list of packages, events and additional events that are shown depend on the contract type. By linking to contract types, the correct repair options will be selected in CSA Quoter.

Branch: Dealership Branch name & number.

Owner: The owner of the quote.

Customer: Customer Name and Customer Number.

Contact

Name: Customer Contact

Type: The types are used in the customer quote doc. In the future, it will be pushed to Equipment Monitoring Toolkit (EMT).

Phone: Contacts Phone Number.

Mobile Phone: Contacts Mobile Phone Number.

Customer Tab: Takes you to Customer Search.

QUOTE REVISION

Overview

A Quote can have unlimited Revisions, copied to New Revision or New Quote or Deleted as needed. Once the revision is created, you can edit the equipment, events and update header information.

P QUOTE NO. 20132	(SUBMITTED	FOR APPROVAL -)					A TET CONTRACTOR LTD (1056130	-)				© TOTALS: REVISION 1				
🕯 Overview 👻 Re	Revision: 🕘 tal August															
Customer 👌 🖗 🖉 🖉 🖉 🖉 terment																
Quoted Equipment													·			
Serial Number	Make	Model	Stock #	Unit #	Start Hour	End Hour	Duration Hr Start Date	End Date	Net Price	Cost Per Hour	Adj. CPH Last Update	Updated By				
Q	AA	130G			750	1750	17 May, 2019	17 May, 2021	\$14,233.68	\$14.23	\$0.00 23 May, 2019	kablem Demo				
Q,	AA	130G			750	2750	23 May, 2019	23 May, 2021	\$2,784.64	\$1.39	\$0.00 23 May, 2019	kablem Demo				
Q	AA	130G			0	2000	31 May, 2019	31 May, 2021	\$3,562.56	\$1.78	\$0.00 29 May, 2019	demouser2 Demo				
									\$20,580,88	\$17,41	\$0.00					

New Revision	⊗
Are you sure you want to copy to a new revis	ion?
Yes No	

③ TOTALS: REVISION 1

How many Revisions or quotes are included.

🗎 Overview 👻	Revisions:	🕞 1 In Progress 🛛 👻

Each individual Revision, including the original quote are presented on the tab menu for further action.

QUOTE EQUIPMENT

Overview

Add equipment to your quote, by either searching by serial number or model, as your starting point. Gives you a history of the machine and the start date and hour of the PM history to qualify the piece of equipment for quoting purposes.

Edit Equipment			Serial N	o Based: 🔵	Model	Based: 💿						¢
Serial Numbe Serial No: SMU: Last Billed SMU: Product Link:	N/A N/A : N/A	stalled Not Activ	Stock No: N/A Unit No: N/A ze Annual Usage: N/A		Model Model Make: Family Serial	:*	130G AA - und 25 - MO 074V00		* *			
Contract	Start 750 ¢ 2019-05-17	End 1750 \$ 2021-05-17	Event Trigger: Interval: Expires By:	50 Fixed Both	Ŧ	hours	Ψ Ψ Ψ	Start a Start P Billing		PM 1 500		V A V
PM History No Data Found				SMU	1		V	WO No	Seg No	Opened	Closed	
											Bave 2	X Cancel

- Serial No.: Search the serial number.
- Contract Hour: Starting hours of the contact for the specified piece of equipment.
- **Contract Date:** Starting date of the contract for the specified piece of equipment.
- **Model:** Search the model you want to reveal to show you the make, family and serial no. range to choose from.

QUOTE EVENTS

Overview

Packages provide a way to group Events and Additional events together, to make quoting common groups of events together.

Additional events can be used to define items that can be included in a CSA Quote, but are not linked to standard jobs. Manual events can be added during the quote process if an item is required that is not part of Events/Additional items.

E	dit I	Events													8
Γ						0	Selected	🗹 Unselec	ted 🗹					📥 Add	Manual Event
Li	Pa	ckage List PM History					Selected	Event 🕆			Cost Pe	Occurrence	Occurrences	Freq.	Net Price
μ		Thirmstory					= PM								
U		Package Name	Description	Events	Occurrences	Warnings Actions		Cabin Filter	5			0	0	1	\$0.00
11	+	Construction Gold 250 / 1000	250 hr interval for 1000 hours	3	4	+ 🗢		Primary Filt	er			0	0	1	\$0.00
	+	Construction Gold 250 / 2000	250 hr interval for 2000 hours	4	8	+ 🗢			-			U			
	+	Construction Gold 250 / 3000	250 hr interval for 3000 hours	4	12	+ 🗢		Travel				0	0	1	\$0.00
	+	Construction Silver 500 / 1000	500 hr intervals for 1000 hours	2	2	+ 🗢		PM 1				\$85.12	4	500	\$340.48
	+	Construction Silver 500 / 2000	500 hr intervals for 2000 hours	3	4	+ 🗢	×	PM 2				\$143.28	5	1000	\$716.40
	+	Construction Silver 500 / 3000	500 hr intervals for 3000 hours	4	10	1 🛉 🖨									
	+	Landfill	Landfill	4	8	+ 🗢		PM 3				\$305.76	3	2000	\$917.28
							\checkmark	PM 4				\$629.76	2	4000	\$1,259.52
								Zone 1 Trav	el			\$250.00	24	1	\$6,000.00
L							- PM2								
								500 Hr				#500.00		1000	\$5,000.00
L								500 Hr				\$500.00	10	1000	\$5,000.00
L							= Inspe	ctions							
L								Inspection				\$50.23	0	16	\$0.00
L							- Produ	ctlink							
L							×	Yearly Subs	criptions			\$300.00	0	2	\$0.00
L															
L.															
L.															
L.															
L.															
													48		\$14,233.68
							Price: \$	14,233.68	Hours:	1000	CPH:	\$14.23	Adj. CPH:		(+0%)
L														💾 Save	X Cancel

```
Selected 🗹 Unselected 🗹
```

Chose to see the events you have chosen, or just the events you have not selected

🖶 Add Manual Event

Manual events can be added during the quote process if an item is required that is not part of Events/Additional items, it provides flexibility to include items in the quote that are not common items.



Occurrences can be deleted or added to individual events.

Price: \$18,060.83 Hours: 2000

CPH: \$9.03



Enter a cost per hour value to overwrite the current rate.

			_			
	Package Name	Description	Events	Occurrences	Warnings	Actions
	Construction Gold 250 / 1000	250 hr interval for 1000 hours	3	4		- +
	Construction Gold 250 / 2000	250 hr interval for 2000 hours	4	8		- +
	Construction Gold 250 / 3000	250 hr interval for 3000 hours	4	12		- +
	Construction Silver 500 / 1000	500 hr intervals for 1000 hours	2	2		- +
	Construction Silver 500 / 2000	500 hr intervals for 2000 hours	3	4		- +
-	Construction Silver 500 / 3000	500 hr intervals for 3000 hours	4	10	1	- +
-	Landfill	Landfill	4	8		- +

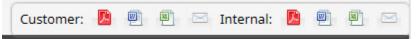
Delete of add a package with the Actions Menu

Expand and collapse selection

QUOTE DOCUMENT

Overview

View Quotes in PDF, Word, Excel Format. Email out any or all formats with key email functionality.



Email Customer	Document 🛞
то:	courtney.gray@uptake.com
cc:	
Subject:*	Demo Ltd- Quote 20132 for TET CONTRACTC
Attachment:	PDF Word Excel
Message:	
	🖂 Send 🗶 Cancel

WORKFLOW BY BRANCH

Overview

Workflow by Branch: Quotes by Branches with numeric values expressing their quote stage,

with the ability to filter according to Year/Month/Branch/Owner. A Cog and the far right will give the ability to *Reload* the Page, *Export to Excel*. The columns viewed can be saved by using the *Save the configuration*, or *Reset Configuration* back to default.

Workflow by Branch							\$≉
illers: fært 2019 - Menth: All Morths - Branch: Al Branches - Owner: Al Owners -							
anch Name	Quoted	Open	Submitted	Won	Lost	No Deal	Close Rate
antifo	5 521,780,88	3 \$1,200.00	2 \$20,580,88	0	0	0	0%
anddi	1 \$0.00	1 50.00	0	0	0	0	0%
and Al	\$2,703.68	1 \$2,703.68	0	0	0	0	0%
xa	Z 524.484.56	5 53.503.68	2 520,580,88	0	0	0	0%

WORKFLOW BY OWNER

Overview

Workflow by Owner : Quotes by Owner with numeric values expressing their quote stage, with the ability to filter according to Year/Month/Branch/Owner.

A Cog an the far right will give the ability to *Reload* the Page, *Export to Excel*. The columns viewed can be saved by using the *Save the configuration*, or *Reset Configuration* back to

Workflow by Owner							₿ø
Filters: Year: 2019 * Month: All Months * Branch: All Branches * Owner: All Owners *							
Owner	Quoted	Open	Submitted	Won	Lost	No Deal	Close Rate
coutin Demo	<u>2</u> <u>\$1,200.00</u>	<u>2</u> 51,200.00	0	0	0	0	0%
demouse? Demo	1 50.00	1 50.00	0	0	0	0	0%
kallem Demo	2 \$20,580,88	1 50.00	1 \$20,580.88	0	0	0	0%
wilk/ Demo	2 \$2.703.68	1 \$2,703.68	1 \$0.00	0	0	0	0%
teal	<u>7</u> <u>\$24.484.56</u>	5 53.903.68	2 520.580.88	0	۰	0	0%

KPI

Overview

KPI: Report of all Quoting Activity by aging on all branches/cost centers, with the ability to filter by Branch & Filter

	© Equipment • ≪ Service • arviceLink = PSQuoter												(Production) 🖉 🖶
A Home New Quote										g. Demo	Admin) Q. Search quotes	٩,	Advanced 🔯 🗉
Y All owners All	branches/cost centers										Period: Year +	-	
Item	Trend	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Quoting Activity													
Opened (#)	/	0	0	0	0	0	0	0	0	0	0	19	7
Won (#)		0	0	0	0	0	0	0	0	0	0	3	0
Lost (#)		0	0	0	0	0	0	0	0	0	0	1	0
No Deal (#)		0	0	0	0	0	0	0	0	0	0	0	0
Lost Reasons													
Brand Preference (#)		0	0	0	0	0	0	0	0	0	0	0	0
Price (#)		0	0	0	0	0	0	0	0	0	0	0	0
Disqualified (#)		0	0	0	0	0	0	0	0	0	0	0	0
Installed Base (#)		0	0	0	0	0	0	0	0	0	0	0	0
Price Value Differential (#)		0	0	0	0	0	0	0	0	0	0	0	0
Product Performance (#)		0	0	0	0	0	0	0	0	0	0	0	0
Trade In Value (#)		0	0	0	0	0	0	0	0	0	0	0	0
Financing (#)		0	0	0	0	0	0	0	0	0	0	0	0
Terms / Finance (#)		0	0	0	0	0	0	0	0	0	0	0	0
Dealer Preference (#)		0	0	0	0	0	0	0	0	0	0	0	0
Configuration (#)		0	0	0	0	0	0	0	0	0	0	0	0
Inventory/Availability (#)		0	0	0	0	0	0	0	0	0	0	0	0
Value Add Options (#)		0	0	0	0	0	0	0	0	0	0	0	0

Key Fields

g. Demo (Admin)	Q Search	quotes Q A	dvanced 🌣 🗉
Period:	Month *	Past 12 Months (With 🔍	
ar 2019	Apr 2019	Past 12 Months (With Current Month)	Jun 2019
		Past 12 Months (Without Current Month)	
3	0	2019	0
0	0	2018	0
0	0	2017	0
0	0	2016	0
		2015	

View the period of activity and change from calendar to fiscal by using the menu items.

Y All owners	All branches/cost centers		
Item	Trend	Jul 2018	Aug 2018 🕆
Quoting Activity			
Won (#)		0	0
Lost (#)		0	0
No Deal (#)		0	0
Opened (#)	- <u></u>	1	1

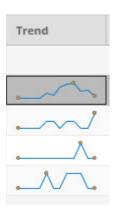
Change the view from ascending to descending and lock down a column to the left for an exact view.

Workfle	ow by Branch									
Filters:										
Year:	2019	Ŧ	Month:	All Months -	Branch:	All Branches	-	Owner:	All Owners	Ŧ
Branch Na	ame 🕆					All Branches	Ì			
Branch00						Branch00	11			
staticitioo						Branch01	U			
Branch01						Branch02				
						Branch03	ŀ			
Branch03						Branch04				
Total						Branch05	1			
lotal						Branch07	ł			
						Branch09				
						Branch10				
						Branch11	1			
						Branch12				
						Branch13				
							J			

Filter by Branch and Cost Center.

Quoting Activity

Collapse or expand each section, or hold down CTRL and click on expand and collapse button.



Click on Trend graph to view time periods inside of the graph.

ADVANCED SEARCH

Overview

The advanced search menu allows you to create a quote based on values you filter. For instance, choose Make: AA: CATERPILLAR, Model: 420. Once the search is complete, the quote can be reviewed or a *New* Quote can be created with all the Customer Header/ Equipment/ Event information intact.

🖀 Home 🗋 Ne	ew Quote				g. Demo (Admin) Q. Search quotes Q. Advanced 🏟 🗏
Advanced Search					
Make:			 Serial No: 	Model/FR Exchange:	
Branch:			 Cost Center: Please select a 	branch • Customer:	(
Originator:			- Owner:	- PM Code:	
Dates:	2016-06-11	2019-06-11	Limit Quotes to Latest: 50 v		
					Q Search) ල Res

Key Fields

Any of this search fields, can be combined to narrow the search.

Make: Search all existing quotes by Make.
Branch: Search all existing quotes by Branch.
Originator: Search all existing quotes by Originator.
Serial No: Search all existing quotes with the serial number entered.
Cost Center: Search all existing quotes by Cost Center.
Owner: Search all existing quotes by Owner.
Model/FR Exchange: Search all existing quotes by Model/FR Exchange..
Customer: Search all existing quotes by Customer name and number
PM Code: Search all existing quotes by PM Codes.
Dates: Choose a Date Range to narrow the scope of the search.
Limit quotes to Latest: Choose 50 or 100 latest quotes to view.

ADMINISTRATION: MANAGEMENT

Contract Types

When creating a quote, there are normally several different types of contracts that can be quoted. An example of some of the different contract types would be:

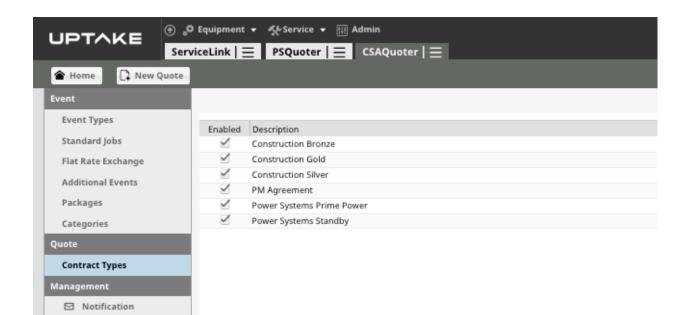
• Do It For Me

- The dealer does all the work associated with the contract items, including parts and labor.
- Do It With Me
 - The customer will be responsible to do some of the contract events and the dealer will do the other contract events.
- Do It Myself
 - The customer will perform all the services and the dealer will provide the parts.

Contract types can also be associated to Event Types and Packages to limit what packages and Events can be quoted for a particular type of contract.

A contract type definition includes:

- The name of the contract type.
 - This is shown on the quote overview page.
- An indicator if the contract type is enabled or not.



Edit Contract T	ype 😒
Description:*	Do it for me - hourly
Enabled:	\checkmark
	Save X Cancel

Contract Types: Where Used in CSA Quoter

Contract types are used in several areas of the application, including

Assigned to the contract header

Quote			
Quote Date:	17 May, 2019		Stage:
Quote Status:	Submitted For Approval		
Contract Type:	PM Agreement	CPI:	No
Description:			
Branch:	Branch00		
Cost Center:			
Owner:	kablem Demo	Office Phone No:	
Mobile Phone No:		Fax No:	
Diff. Owner:			
Comments:			

• Used to filter the packages and events that can be added to a quote

1	idit Events											
Γ					0	Selected	🖌 Unselected 🗹				+ ^	dd Manual Event
	Package List PM History					Selected	Event 🕆		Cost Per Occurrence	Occurrences	Freq.	Net Price
L						= PM						
L	Package Name Description	Events	Occurrences	Warnings Actio			Cabin Filters		0	0	1	\$0.00
L	Construction Gold 250 / 1000 250 hr interval for 1000 hours	3	4		••		Primary Filter		0	0	1	\$0.00
L	Construction Gold 250 / 2000 250 hr interval for 2000 hours	4	8		• •		-				1	
L	Construction Gold 250 / 3000 250 hr interval for 3000 hours	4	12		••		Travel		0	0		\$0.00
L	Construction Silver 500 / 1000 500 hr intervals for 1000 ho	2	2		••		PM 1		\$85.12	4	500	\$340.48
L	Construction Silver 500 / 2000 500 hr intervals for 2000 ho	3	4		••	1	PM 2		\$143.28	5	1000	\$716.40
L	Construction Silver 500 / 3000 500 hr intervals for 3000 ho	4	10		••	1	PM 3		\$305.76	3	2000	\$917.28
L	Eandfill Landfill	4	8		••							
L						\sim	PM 4		\$629.76	2	4000	\$1,259.52
L						2	Zone 1 Travel		\$250.00	24	1	\$6,000.00
L						= PM2						
L						2 🗢	500 Hr		\$500.00	10	1000	\$5,000.00
L						= Inspec	tions					
L							Inspection		\$50.23	0	16	\$0.00
L						= Produ	ctlink					
L						1	Yearly Subscriptions		\$300.00	0	2	\$0.00
L												
L												
L												
L												
L										48		\$14,233.68
L												
1						Price: \$1	4,233.68 Hours:	1000	CPH: \$14.23	Adj. CPH	:	(+0%)
L											💾 Sa	ve 🗙 Cancel

• On the quote document

Package management pages

Edit Package						⊗
Package Name:*	2000 Hour 250 interval - D4M		Description:*	2000 Hour 250 interval - D4M		
Contract Type:*	Do it for me - hourly	*	Enabled:			
Add Event	Add Additional Event					
Events						
Event Type:*	PM1 (250 hr) D4M	Ŧ	Occurrences:*	4	\$	1
Event Type:*	PM2 (500 hr) D4M	-	Occurrences:*	2		1
Event Type:*	PM3 (1000 hr) D4M	-	Occurrences:*	1		1
Event Type:*	PM4 (2000 hr) D4M	Ŧ	Occurrences:*	1		1
Event Type:*	Perform Valve Adjust (Labour Inc.)	*	Occurrences:*	1	\$	1
Additional Event	'S					
				Save 🕽	Cano	cel

• Package Page

Categories

Categories are used in CSA Quoter to group Event Types and Additional Events together to make the quote more clear. An example of a category would be:

- Standard PM Intervals
- Initial Service Intervals
- Additional Service Intervals

The definition of a category type include

• The Category description

This is shown with the quote

Sort Order

The order to show the categories in

• Use as a Default

This is used as the default category if an Event Type or Additional Event has not been assigned a category

UPTAKE	© s ^p Equipment + ft-Service + ⊡ Admin ServiceLink = PSQuoter = CSAQuoter =	(Production) 🖉 👼
🖀 Home 🕞 N	wQuote	g. Demo (Admin) 🔍 20132 🔍 🔍 Advanced 🗳 🚍
Event		a Add Category
Event Types	Description	Sert Order Use As Default
Standard Jobs	PM	5 No 🗹 🗢
Flat Rate Exchange	Inspections	10 No 🗹 🗢
Additional Events	PM2	10 No 🗹 🗢
	Repair Before Failure	15 No 🗹 🗢
Packages	Productlink	20 Yes 🗹 🗢
Categories		
Quote		
Contract Types		
Management		

Categories: Where Used in CSA Quoter

Categories are used in the application where ever the list of events are displayed, this includes

• Equipment quote summary page

	UPTAK	E										(P)	Production) 🖉 🖶
	🚖 Home 💽									g. Demo (Admin)	Q. 20132	Q. Adv	vanced 🔕 🖃
	\Lambda 🖋 QUOTE NO. 2	0132 (SUBMITTED FOR APPROVAL -)			A TET CONTRACTOR LTD (1056130 -)			I TOTALS: REVISION 1				
International and the set of the	_											,	TET CONTRACT
International and	🝵 Summary 💽	Equipment 😫 👔 Documents									Customer: 🙇 🕘	🖉 🖂 Internat	
Ref. withRef. With <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th>🕑 Edit Events 🕇</th> <th>Add Equipment 🛛 🖉 Edit</th> <th>Equipment</th> <th>Delete Equipment</th>										🕑 Edit Events 🕇	Add Equipment 🛛 🖉 Edit	Equipment	Delete Equipment
Mais 105 105 1141112Bota 105 105 1141112Mais 105 105 1141112Mais 105 105 105 1141112Mais 105 105 105 105 1141112Mais 105 105 105 105 105 105 105Mais 105 106	Stock No: Model: 1305	Unit Ne:		Stock No:			Serial No: Stock No: Model: 1306	Unit No:					
index Max Max is is it is it is it is it is it is i		M	Stock Ne:			750	Event Trigger:	50 hours			Cost Per Hour:	\$14.23	
International contracts Name of the grant of the standard Name of the grant of the standard Name	Model:	1306	Unit No:		Contract End Hr:	1750	Interval:	Fixed			Adjusted CPH:		
Image: Band and a start with a start wit	Serial No:		SMU:		Contract Duration:	1000 Hr	Expires By:	Both			Variance:	+0%	
Bing band Note Note Note Carl Protocom 70 1000	Last Billed SMU:		Annual Usage:		Contract Start Date:	17 May, 2019	Start at PM:	PM 1					
Dett Control Control Destroit Destroit Destroit Control Contro Control	Product Link:	Factory Not Installed Not Active			Contract End Date:	17 May, 2021	Start PM hr:	500					
Implementation 101,2 4 104,0 40,4 M2 101,2 5 101,0 10,2 101,0 10,2							Billing Interval:						
Implementation 101,2 4 104,0 40,4 M2 101,2 5 101,0 10,2 101,0 10,2	Event									Cost Per Occurrence	Occurrences	Net Price	Cost Per Hour
N2 11,23 5 11,23 5 11,23 10,20													
N3 100.5% 2 10.7% 10.8 N4 100 100.0% 10 100.0% Total 100.0% 10 100.0% 10 N4 100.0% 10 100.0% 10 100.0%											4		
N4 120,75 2 120,50 14,0													
Zon Tond 1500 34 56,000													
■ Nd 5000 10 5000 10 5000 10 5000 10 5000 10 5000 10 5000													
109 * 500 0 10 500 0 50													
Padatibilità 100.0 0 50.0 50.0 50.0 Productional 100.0 0 50.0 50.0 50.0 50.0										\$500.00	10	\$5,000.00	\$5.00
4 11/22/0 11/22	= Productlink												
a 11.23.4 (57.8 28) 46.07.8 28	Yearly Subscriptions									\$100.00	0	\$0.00	\$0.00
44 \$4,233,64 \$4,227													
											48	\$14,233.68	\$14.23 Adj. CPH: \$0.00

• Event Add/Edit Page

				0						Manual Even
ackage List PM History					Selected	Event 🕆	Cost Per Occurrence	Occurrences	Freq.	Net Pric
					= PM					
Package Name	Description	Events	Occurrences Warnin			Cabin Filters	0	0	1	\$0.0
	250 hr interval for 1000 hours	3	4	+•		Primary Filter	0	0	1	\$0.0
	250 hr interval for 2000 hours	4	8	+ •					1	*0.1
	250 hr interval for 3000 hours	4	12	+•		Travel	0	0		\$0.0
	500 hr intervals for 1000 ho	2	2	+ •	\checkmark	PM 1	\$85.12	4	500	\$340.4
Construction Silver 500 / 2000		3	4	+0	×	PM 2	\$143.28	5	1000	\$716.4
	500 hr intervals for 3000 ho	4	10 1	+0	~	PM 3	\$305.76	3	2000	\$917.3
Landfill	Landfill	4	8		~	PM 4	\$629.76	3	4000	\$1,259
								2		- 1
					\leq	Zone 1 Travel	\$250.00	24	1	\$6,000.
					PM2					
					Z 🗢	500 Hr	\$500.00	10	1000	\$5,000.
					= Inspec	tions				
						Inspection	\$50.23	0	16	\$0.
					- Produc	tlink				
					×	Yearly Subscriptions	\$300.00	0	2	\$0.
								48		\$14,233.
					Price: \$14	4.233.68 Hours: 1000	CPH: \$14.23	Adj. CPH:		(+0%)

• Events Edit Page

CAT, 420D	Number of Occurences
Standard PM Intervals	
PM2 (500 hr) D4M	2
PM3 (1000 hr) D4M	1
PM3 (1000 hr) DIM	0
PM3 (1000 hr) WWM	0
PM4 (2000 br) D4M	1
Additional Service Interval:	
Additional Options	
Cab Air Filters (fresh & recirc.) (\$ for both pcs)	4
Perform Valve Adjust (Labour Inc.)	1
Primary Engine Air Filter (\$/pc) PY	4
Secondary Engine Air Filter (\$/pc) SE	4
Contract Length (hrs):	2000
Retail Cost Per Hour:	\$6.15
Adjusted Cost Per Hour:	\$0.00

Assigned to the Event Type

Edit Event Type				⊗
Event Type:* Enabled:	PM1 (250 hr) D4M	Category:*	Standard PM Intervals	•
Job Code: * Modifier: Qty Code: Cab Type: Job Condition:	540 - PERFORM * D4M - DO IT FOR ME * * *	Component Code:* Business Group: Work App: Job Location: Shop/Field:	7501 - PM 1	•
Restrict by Contract Type:	~	Sort Order:*	10 E Save X	¢

Event Types

Event Types is used to define the main PM events that can be quoted on A CSA Quoter. In order for Event Types to have the correct prices per serial number and module the Event Types are linked to DBS standard jobs.

Below is a definition of the important terms related to Event Types

• Event Type

- An Event Type is a generic definition of a PM event that is added to quotes
 - The Event Types are used to build packages
 - The Event Types also show as individual items on the Event List that is associated to a piece of equipment on a quote revision
 - An Event Type is not directly associated to a serial number or model
- Standard Jobs
 - Standard jobs are imported from DBS
 - Standard jobs define the standard cost of repair options
 - Standard jobs are associated to a serial number range and model
- SMCS Codes
- SMCS codes are used in Standard Jobs and DBS work order segments to define a repair service
- The common SMCS codes are
 - Job Code: what action is being performed in the repair option
 - Component Code: what part of the equipment is the work being done on
 - Modifier Code: Allows to further define the part of equipment the service is being done on
 - There are 6 other SMCS codes but are not used that often
- Below is an explanation how is an Event Type linked to a Standard Job that is tied to a serial number and how the correct costs are shown in a quote
 - The Event Type is defined by assigning the SMCS Job Code, Component Code and possibly the Modifier Code to the Event Type
 - When DBS standard jobs are imported into CSA Quoter a matching algorithm is used to look at all the Standard Jobs and based on the associated SMCS codes link the Standard Job to the appropriate Event Type
 - When creating a quote a serial number or model is defined
 - The serial number or model is then used to determine the standard jobs that match
 - Based on the matched standard jobs the Event Types that are linked to the standard jobs are shown with in the quote
 - The costs are taken from the linked standard job

Event Types: Where Used in CSA Quoter

Event types are used within other Admin functions and also within the application, below is a list of the places the Event Types are used.

• Standard Job admin page, display the Event Types that map to the standard job

CSA QUOTER

Home New Quot	te										g. Demo (Admin) 🔍	0132	Q Advanc	ed 🗘 =
int	Equipment Families	Equipment h	Aodels and Serial Ranges			Events								
vent Types	Family	Model	nouclo una seriar ranges											
andard Jobs						< Back Ev	ent						Save	🛉 Add Event
	Description	Make	Model	Begin S/N	End S/N	Enabled Even	nt Name	Category	Cost Per Occurrence	Frequency	Next Frequency Job Code	Comp Code	Modifier	c
at Rate Exchange	AGRICULTURAL PRODUCTS	AA	205	03HC00001	03HC99999	🗹 Dem	io Event	PM	\$5,000.00	2	5 000 - COMB REPAIR TL.	0001 - NON-WARRANTY		
ditional Events	BACKHOE LOADERS	AA	205	04DC00001	04DC99999									
:kages	CERT REBLD TROKTYPE LOADR	AA	205B	052F00001	05ZF99999	- 1								
	CERTIFIED REBUILD TTT	AA	206	02RC00001	02RC99999									
tegories	CONSTRUCTION HISTORY	AA	206	03GC00001	03GC99999									
	ENGINE HISTORY	AA	2068	09BF00001	09BF99999									
ntract Types	EXCAVATORS	AA	211	04EC00001	04EC999999									
	FOREST PRODUCTS	AA	211	05CC00001	05CC999999									
gement	GENERATORS	AA	211B	06XG00001	0606999999									
Notification	IND ENG/GEN SET ENG	AA	212	03jC00001	03JC99999									
	MARINE ENGINES	AA	212	05DC00001	05DC99999									
	MOTOR GRADERS	AA	212B	03PJ00001	03Pj99999									
	MT	AA	213	03ZC00001	03ZC999999									
	OHT & TRACTORS/AT	AA	213	090(B00001	090(899999									
	PIPELAYERS	AA	213B	01EJ00001	01EJ99999									
	SKIDDERS	AA	214	01KB00001	01KB99999									
	TRACK-TYPE LOADERS	AA	214	09MB00001	09MB99999									
	TRACK-TYPE TRACTORS	AA	214B	04CF00001	04CF99999									
	WHEEL DOZERS/COMPACTORS	AA	214B	09MF00001	09MF99999									
	WHEEL LOADERS/ITC	AA	215	014200001	014299999									
	WHEEL TRACTOR-SCRAPERS	AA	215	057Y00001	057Y99999									
		44	215	061200001	061299999									

• Flat Rate Exchange Admin Page, show the Event Types that map to the Flat Rate Exchanges

ServiceLink = PSQuoter = CS						g. Demo (Admin) Q. 20132	Q. Adv
Flat Rate Exchange	_						
FR Exchange							
ange No Data Found.					Events		
ints							
s							
ion							
Flat Rate Exchange	Even	S					
FR Exchange	< В	ack Event			Save	📥 Add Event	
Description	Enabl	ed Event Name	Category	Cost Per Occurrence	Frequency	Next Frequency	
BRZONE1		Travel	Additional Options	\$390.00	0	0	
BRZONE2							
BRZONE3							
BRZONE4							
BRZONE5							
BRZONE6							
BRZONE7							
K BRZONE8							
BRZONE9	-						
GBRS							
GENERATOR TRAVEL							
GREL							
GREM							
GRES							
HOSE1							
LUBE1							
NFZONE1							

(COMBINE)

• Event Add/Edit related to a quoted serial number.

Edit Events		8
0	Selected 🗹 Unselected 🗹	Add Manual Event
Package List PM History	Selected Event The Cost Per Occurrence Occurrences	Net Price
	Standard PM Intervals	
Package Name Description Events Occurrences Warnings	PM1 (250 hr) D4M \$448.12 0	\$0.00
2000 Hour 250 interval 2000 Hour 250 interval 5 9 Description: PM1 (250 hr) D4M Occurrences: 4	PM1 (250 hr) DIM \$118.24 0	\$0.00
Description: PM2 (500 hr) D4M Cccurrences: 2 Description: PM3 (1000 hr) D4M Cccurrences: 1	PM2 (500 hr) D4M \$981.81 0	\$0.00
Description: PM4 (2000 hr) D4M Occurrences: 1	PM3 (1000 hr) D4M \$1,710.18 0	\$0.00
Description: Perform Valve Adjust (Labour Inc.) Occurrences: 1 2000 Hour 500 interval	PM4 (2000 hr) D4M \$1,829.18 0	\$0.00
2000 Hour 500 interval 2000 Hour Package - D 4 5	Perform Valve Adjust (L \$433.21 0	\$0.00
	- Additional Service Intervals	
	Hydraulic O/C CAT Adv \$450.02 0	\$0.00
	Hydraulic O/C Bulk DE \$408.12 0	\$0.00
	Hydraulic O/C Bulk Win \$595.79 0	\$0.00
	0	\$0.00
4	Price: \$0.00 Hours: 2000 CPH: \$0.00 Adj. CPH:	(+0%)
	2 [1]	ave 🗙 Cancel

• Quote document

CAT, 420D	Number of Occurences
Standard PM Intervals	
PM2 (500 hr) D4M	2
PM3 (1000 hr) D4M	1
PM3 (1000 hr) DEM	0
PM3 (1000 hr) WWM	0
PM4 (2000 hr) D4M	1
Additional Service Intervals	
Additional Options	
Cab Air Filters (fresh & recirc.) (\$ for both pcs)	4
Perform Valve Adjust (Labour Inc.)	1
Primary Engine Air Filter (\$/pc) PY	4
Secondary Engine Air Filter (\$/pc) SE	4
Contract Length (hrs):	2000
Retail Cost Per Hour:	\$6.15
Adjusted Cost Per Hour:	\$0.00

• Package definition admin page

Edit Package					8
Package Name:*	2000 Hour 250 interval - D4M		Description:*	2000 Hour 250 interva	al - D4M
Contract Type:*	Do it for me - hourly	*	Enabled:	\checkmark	
📫 Add Event 🖣	Add Additional Event				
Events					
Event Type:*	PM1 (250 hr) D4M	+	Occurrences:*	4	÷ 📋
Event Type:*	PM2 (500 hr) D4M		Occurrences:*	2	÷ 📋
Event Type:*	PM3 (1000 hr) D4M	*	Occurrences:*	1	÷ 📋
Event Type:*	PM4 (2000 hr) D4M	Ŧ	Occurrences:*	1	÷ 📋
Event Type:*	Perform Valve Adjust (Labour Inc.)	*	Occurrences:*	1	÷ 📋
Additional Event	s				
				_	
					Save 🗙 Cancel

Flat Rate Exchange	Events					
FR Exchange	K Back	Event			Save	📫 Add Event
Description	Enabled	Event Name	Category	Cost Per Occurrence	Frequency	Next Frequency
BRZONE1		Travel	Additional Options	\$390.00	0	0
BRZONE2						
BRZONE3						
BRZONE4						
BRZONE5						
BRZONE6						
BRZONE7						
BRZONE8						
BRZONE9						
GBRS						
GENERATOR TRAVEL						
GREL						
GREM						
GRES						
HOSE1						
LUBE1						
NFZONE1						
NFZONE10	-					

Standard Jobs

The standard job admin page allows the user to achieve the following functionality

- View the linkage from a DBS standard job to Event Types
- Have the ability to disable particular standard jobs from being quoted
- Have the ability to create a local standard job and have it assigned to a serial number range

Standard Job Listing Page

The standard job listing page groups the standard jobs by product family and then the model/serial number range. The only standard jobs that show are the ones that match the Event Types.

The user has the ability to set the enabled flag and initiate a new local standard job for this model/serial number range.

	ServiceLink \equiv PSQuoter \equiv CSAQu	oter =											
iome 🚺 New Quot	te									g. Demo (Admin) 🔍	20132	Q Advanced	d 🗘
	Equipment Families	Equipment	Models and Serial Ranges			Events							
nt Types	Family	Model	nooeis ano seriar nariges										_
rd Jobs				0	8-16h	< Back Event						🖬 Save 📑	Add Ev
Rate Exchange	Description AGRICULTURAL PRODUCTS	Make	Model 205	Begin S/N 03HC00001	End S/N 03HC99999	Enabled Event Name	Category	Cost Per Occurrence	Frequency	Next Frequency Job Code	Comp Code	Modifier	
		AA				Demo Event	Inspections	\$5.00	2	5 000 - COMB REPAIR T	L. 0100 - FNDMTL KNOWL		
onal Events	BACKHOE LOADERS CERT REBLD TRCKTYPE LOADR	AA AA	205 2058	04DC00001 052F00001	04DC99999 05ZF99999	-							
ages	CERTIFIED REBUILD TTT	AA	2058	052F00001	02RC99999	-							
ories	CONSTRUCTION HISTORY	AA	206	03GC00001	036C99999	_ *							
ries	ENGINE HISTORY	AA	206	03GC00001	03GC999999								
	EXCAVATORS	A	2008	04EC00001	04EC99999								
act Types	FOREST PRODUCTS	AA	211	0500001	04EC99999								
	GENERATORS	A	211	05CC00001	06XG99999								
ment	IND ENG/GEN SET ENG	AA	2118	03/00001	03(099999								
otification	MARINE ENGINES	A	212	05DC00001	05DC99999								
	MOTOR GRADERS	AA	212	03P100001	03P(99999								
	MT	A	2126	032C00001	032(99999								
	OHT & TRACTORS/AT	AA	213	0%800001	032C99999								
	PIPELAYERS	AA	213	01EI00001	01E/99999								
	SKIDDERS		2130	01KB00001	01KB92929								
	TRACK-TYPE LOADERS	A	214	09M800001	09MB99999								
	TRACK-TYPE TRACTORS	AA	214	04CF00001	04CF99999								
	WHEEL DOZERS/COMPACTORS	A	2148	09MF00001	09MF93939								
	WHEEL LOADERS/ITC	AA	2140	014200001	014299999								
	WHEEL TRACTOR-SCRAPERS	AA	215	057100001	057999999								
	The contract of the cost		215	051200001	061299999								
		AA	215	095200001	095299999								
	4	<	215	096L00001	096L99999								
		44	215	02%C00001	02XC99999								

Standard Job Add Local Event Page

A local standard job can be added by clicking the Add Event following page is shown and allows the user to create the local standard job.

Local standard jobs will show up on the quote that is related to the model/serial number range.

USER GUIDE

Add Event			8
Event Name:*	Local Std Jobs	Category:*	Additional Service Intervals
Enabled:			
Job Code:*	540 - PERFORM	Component Code:*	7731 - ADT PM SERVICES
Modifier:		Qty Code:	· · · · · · · · · · · · · · · · · · ·
Job Location:		- Work App:	×
Job Condition:		- Cab Type:	·
Business Group:		Shop/Field:*	×
Frequency:*	5000	Next Frequency:*	5000 🌲
Default Price:*	485	\$	
Add Store Price	•		
			Save 🗶 Cancel

Standard Jobs: Where Used in CSA Quoter

Standard jobs are used in the back ground when creating a quote. By Selecting Event Types in the Add/Edit Event window the prices are derived from the associated standard jobs.

From the user perspective they will not know if the Event in the quote came from a standard job, flat rate exchange or additional event.

				G	Selected 🚽	Unselected 🗹		井 Ade	d Manual Eve
Package List PM Hist	tory				Selected	Event 🕇	Cost Per Occurrence	Occurrences	Net Price
					- Standa	rd PM Intervals			
Package Name	Description	Events	Occurrences	Warnings		PM1 (250 hr) D4M	\$448.12	0	\$0.00
	2000 Hour 250 interval) hr) D4M occurrences:		9			PM1 (250 hr) DIM	\$118.24	0	\$0.00
	0 hr) D4M Cccurrences: 00 hr) D4M Occurrences					PM2 (500 hr) D4M	\$981.81	0	\$0.00
Description: PM4 (200	00 hr) D4M Occurrences	: 1				PM3 (1000 hr) D4M	\$1,710.18	0	\$0.00
	Valve Adjust (Labour Inc.)					PM4 (2000 hr) D4M	\$1,829.18	0	\$0.00
2000 Hour 500 interval	2000 Hour Package - D	4	5			Perform Valve Adjust (L	\$433.21	0	\$0.00
					- Additio	nal Service Intervals			
						Hydraulic O/C CAT Adv	\$450.02	0	\$0.00
						Hydraulic O/C Bulk DE	\$408.12	0	\$0.00
						Hydraulic O/C Bulk Win	\$595.79	0	\$0.00
								0	\$0.00
		_	_	Þ	Price: \$0.0	00 Hours: 2000	CPH: \$0.00 A	dj. CPH:	(+0%)

Flat Rate Exchange

The flat rate exchange admin page allow the user to achieve the following functionality.

- View the linkage from the flat rate exchange to the Event Types.
- Have the ability to disable particular flat rate exchanges from being quoted.
- Have the ability to create a local flat rate exchange.

Flat Rate Exchange Listing Page

The flat rate exchange listing page shows the FR Exchange names and allows the user to drill into the list of matching Event Types.

Event	Flat Rate Exchange	Events					
Event Types	FR Exchange	< Back	Event			Save	📥 Add Event
Standard Jobs	Description	Enabled	Event Name	Category	Cost Per Occurrence	Frequency	Next Frequency
Flat Rate Exchange	BRZONE1	- I	Travel	Additional Options	\$390.00	0	0
Additional Events	BRZONE2			Additional options	4570.00		
Packages	BRZONE3						
Categories	BRZONE4						
-	BRZONES						
Quote	BRZONE6						
Contract Types	BRZONE7						
Management	< BRZONE8						
Notification	BRZONE9						
	GBRS						
	GENERATOR TRAVEL						
	GREL						
	GREM						
	GRES						
	HOSE1						
	LUBE1						
	NFZONE1						
	NFZONE10	-					•

Flat Rate Exchange Add Local FR Exchange

A local flat rate exchange can be added by clicking the **Add Event** following page is shown and allows the user to create the local flat rate exchange.

Local flat rate exchanges will show up on any quote.

Add Event			8
Event Name:*	Local FR Exchange	Category:*	Standard PM Intervals
Enabled:			
Job Code:*	540 - PERFORM 👻	Component Code:*	7327 - SEAT BELT 💌
Modifier:	-	Qty Code:	-
Job Location:	·	Work App:	·
Job Condition:	· · · · · · · · · · · · · · · · · · ·	Cab Type:	-
Business Group:	-	Shop/Field:*	•
20020			
Frequency:*	2500 🌩	Next Frequency:*	2500 \$
Default Price:*	125 \$		T0001148247-0479055560113
Add Store Price			
			Save X Cancel

Flat Rate Exchange: Where Used in CSA Quoter

Flat rate exchanges are included in the list of Events that can be added to a quote, they appear as Events. From the user perspective they will not know if the Event in the quote came from a standard job, flat rate exchange or additional event.

	vents									
						Selected 🚽	🖌 Unselected 🗹		📥 Ade	d Manual Eve
' a	ckage List PM Hist	ory				Selected	Event 🕇	Cost Per Occurrence	Occurrences	Net Price
1	Package Name	Description	Events	Occurrences	Warnings		Refill Auto Greaser (5kg)	\$93.04	0	\$0.00
[2000 Hour 250 interval	2000 Hour 250 interval	5	9			Refill Auto Greaser (5kg)	\$97.84	0	\$0.00
	2000 Hour 500 interval	2000 Hour Package - D	4	5			Travel	\$85.00	0	\$0.00
							Travel	\$110.00	0	\$0.00
							Travel	\$150.00	0	\$0.00
							Travel	\$200.00	0	\$0.00
							Travel	\$240.00	0	\$0.00
							Travel	\$285.00	0	\$0.00
							Travel	\$325.00	0	\$0.00
							Travel	\$390.00	0	\$0.00
						4				
									0	\$0.00
					•	Price: \$0.0	00 Hours: 2000	CPH: \$0.00 A	dj. CPH:	(+0%)

Additional Events

Additional events are used to create an item that is similar to an Event Type but the Additional Event is not tied to a standard job or specific models or serial numbers. Since Additional Events are not tied to a standard job the price of the default Additional Event price is locally defined. The price can also be changed within a quote.

Additional events can be linked to one or more contract types.

Additional Events Listing Page

The Additional Events listing page show the list of current additional events and also allows the user to enable or disable the event.

				(Productio	on) 🖋 🖶
			g. Demo (Admin) Q. 20132	Q Advanced	۰ =
			E 50	ve 📑 Add Additi	tional Event
Enabled	Event Name	Category		Sort Order	
1	Cabin Fibers	PM		1	2 🗢
2	Inspection	Inspections		50	2 😑
2	Primary Filter	PM		2	2 🗢
2	Travel	PM		3	2 🗢
1	Yearly Subscriptions	Productlink		20	2 🗢
2	Zone 1 Travel	PM		25	2 🗢
	Enabled	Exabled Describence ✓ Cabit Flows ✓ Despection ✓ Prime yither ✓ Travel ✓ Yange Statement	NexterNak	CARADURAL I PODURATI I CARADURATI I CARADURATURATI I CARADURATURATURATI I CARADURATURATURATURATURATURATURATURATURATURAT	Construit Construit <thconstruit< th=""> Construit <thconstruit< th=""> Construit <thconstruit< th=""> <thconstruit< th=""> <thcon< td=""></thcon<></thconstruit<></thconstruit<></thconstruit<></thconstruit<>

Additional Event Management Page

An Additional Event can be modified by clicking on the *symbol* or click on the

📥 Add Additional Event

to add a new Additional Event.

Setting up an Additional Event is the same as creating an Event Type, the only differences are:

- The price of an Additional Event is manually set on the management page
- The price of an Additional Event can also be adjusted when creating a quote if the Manual Price checkbox is selected

Edit Additional Eve	ent			0	
Event Name:*	Product Link Subscription Fee	Category:*	Additional Options	-	
Enabled:					
Job Code:	991 - ADDITIONAL BILLING FOR	· Component (ode: A037 - SUBSCRIPTION FEE	*	
Modifier:		Qty Code:		-	
Job Location:		 Work App: 		*	
Job Condition:		Cab Type:			
Business Group:		Shop/Field:		*	
Frequency:*	0	Next Frequer	cy:* 0	\$	
Default Price:*	0	Annual Price			
Sort Order:*	55	* *			
+ Add Store Price					
Store:*	11 - Concord Truck HO	Price:*	189	÷ 👕	
			E Save	X Cancel	
Default	Price:* 270			¢ M	anual Price:

Additional Events: Where Used in CSA Quoter

Additional Events are shown on the Event add/edit page and also shown on the quote document.

it Ev	ents									
						Selected 🚽	Unselected 🗹		📥 Ad	d Manual Ever
Paci	cage List PM Hist	ory				Selected	Event 🕇	Cost Per Occurrence	Occurrences	Net Price
P	ackage Name	Description	Events	Occurrences	Warnings		6000 hr (Labour Inc.)	\$637.60	0	\$0.00
	000 Hour 250 interval	2000 Hour 250 interval	5	9		E Additio	nal Options			
	000 Hour 500 interval	2000 Hour Package - D	4	5			Primary Engine Air Filter	\$79.26	0	\$0.00
							Secondary Engine Air Fi	\$48.20	0	\$0.00
							Cab Air Filters (fresh &	\$63.77	0	\$0.00
							Shipping Charges - WW	0	0	\$0.00
							Product Link Subscripti	0	0	\$0.00
							Winter Oil Conversion	0	0	\$0.00
							Refill Auto Greaser (20k	\$343.62	0	\$0.00
							Refill Auto Greaser (8kg)	\$154.14	0	\$0.00
							Refill Auto Greaser (5kg)	\$93.04	0	\$0.00
						×			0	\$0.00
_					•	Price: \$0.0	00 Hours: 2000	CPH: \$0.00	Adj. CPH:	(+0%)
					,					(*****)

Packages

Packages provide a way to group one or more Event Types and Additional Events together, also within the package the number of occurrences of the event are entered. Packages provide a quick way to add a common set and number of occurrences to a quote. An example of a package would be a 2000 hour PM contract that is made up of 4 PM1, 2 PM2, 1 PM3 and 1 PM4 event.

Packages List Page

The Package listing page provides a view of the current packages and the ability to enable or disable events.

🚖 Home 🚺 New Que	ote				g. Demo (Admin) Q. 20132	Q, Adv	ranced	
vent						🔡 Save	+ Add	Package
Event Types	Enab	led Package Name	Description	Contract Type		Events Occ.	urrences A	ctions
Standard Jobs	1		250 hr interval for 1000 hours	PM Agreement		3	4	
Flat Rate Exchange	1	Construction Gold 250 / 2000	250 hr interval for 2000 hours	PM Agreement		4	8	
Additional Events		Construction Gold 250 / 3000	250 hr interval for 3000 hours	PM Agreement		4	12	2 🗢
	2	Construction Silver 500 / 1000	500 hr intervals for 1000 hours	PM Agreement		2	2	2 🗢
Packages	1	Construction Silver 500 / 2000	500 hr intervals for 2000 hours	PM Agreement		3	4	2 🗢
Categories	2	Construction Silver 500 / 3000	500 hr intervals for 3000 hours	PM Agreement		4	10	20
uote			Landfil	PM Agreement		4	8	2 🗢
		Test Package 2500	Test	Construction Bronze		3	5	2 🗢
Contract Types								

button, to edit an existing Package click

Packages Management Page

To add a new Package click on the Add Package on the symbol.

Edit Package					¢
Package Name:* Contract Type:* Add Event	2000 Hour 250 interval - D4M Do it for me - hourly Add Additional Event	*	Description: * Enabled:	2000 Hour 250 interval - D4M	
Events					
Event Type:*	PM1 (250 hr) D4M	*	Occurrences:*	4	÷ 👕
Event Type:*	PM2 (500 hr) D4M	Ŧ	Occurrences:*	2	÷ 📋
Event Type:*	PM3 (1000 hr) D4M	*	Occurrences:*	1	÷ 👕
Event Type:*	PM4 (2000 hr) D4M	Ŧ	Occurrences:*	1	÷ 📋
Event Type:*	Perform Valve Adjust (Labour Inc.)	*	Occurrences:*	1	÷ 📋
Additional Events					
				Save	🗙 Cancel

Packages: Where Used in CSA Quoter

Packages are used in the add/edit event window within a quote.

Events	Selected 🗸	Unselected 🗹		- Ada	d Manual Ever
ackage List PM History	Selected	Event †	Cost Per Occurrence	Occurrences	Net Price
		6000 hr (Labour Inc.)	\$637.60	0	\$0.00
Package Name Description Events Occurrences Warnings	- Additio	nal Options			
2000 Hour 250 interval 2000 Hour 250 interval 5 9 Description: PM1 (250 hr) D4M Occurrences: 4		Primary Engine Air Filter	\$79.26	0	\$0.00
Description: PM2 (500 hr) D4M Occurrences: 2 Description: PM3 (1000 hr) D4M Occurrences: 1		Secondary Engine Air Fi	\$48.20	0	\$0.00
Description: PM4 (2000 hr) D4M Occurrences: 1		Cab Air Filters (fresh &	\$63.77	0	\$0.00
Description: Perform Valve Adjust (Labour Inc.) Occurrences: 1		Shipping Charges - WW	0	0	\$0.00
2000 Hour 500 interval 2000 Hour Package - D 4 5 Description: PM2 (500 hr) D4M Occurrences: 2		Product Link Subscripti	0	0	\$0.00
Description: PM3 (1000 hr) D4M Occurrences: 1 Description: PM4 (2000 hr) D4M Occurrences: 1		Winter Oil Conversion	0	0	\$0.00
Description: Perform Valve Adjust (Labour Inc.) Occurrences: 1		Refill Auto Greaser (20k	\$343.62	0	\$0.00
		Refill Auto Greaser (8kg)	\$154.14	0	\$0.00
		Refill Auto Greaser (5kg)	\$93.04	0	\$0.00
	•			0	\$0.00
	Price: \$0.0	00 Hours: 2000	CPH: \$0.00 A	dj. CPH:	(+0%)
, , , , , , , , , , , , , , , , , , ,	Frice. \$0.0	50 Hours. 2000	CFII. \$0.00 P	uj. crn.	e 🗶 Can

Notifications

The notification functionality in CSA Quoter

Notification List Page

The notification module of CSA Quoter is used to automatically send out emails based different events that can occur in CSA Quoter.

Notification Listing Page

The listing page displays the current notifications that have been setup in CSA Quoter.

Notifications can be deleted by clicking the imes symbol.

	_0 Equipment + K/c-Service + III Admin erviceLink Ξ PSQuoter Ξ CSAQuoter Ξ					(Production) 🔗 💮
A Home New Quot					g. Demo (Admin) Q. 20132	Q Advanced 😫 💷
Event					Criteria	Notification Settings
Event Types	Recipient	Event	Comments	Changed By	Quote Type Branch	Addr. Field
Standard Jobs	Owner	Submitted for Approval	Test Comment	demouser1 Demo on Aug 30, 2018	All Quote Types All Branches	cc 🗹 🗶
Flat Rate Exchange	Originator	Created		demouser1 Demo on Nov 22, 2018	All Quote Types All Branches	cc 🛛 🗶 🗶
Additional Events						
Packages						
Categories						
Quote						
Contract Types						
Management						
Notification						

Notification Management Page

Add

button.

symbol or add a new notification by clicking on the

Edit Notificatio	n	8
Recipient:*	Assigned Rep Sales Manager	
Event:*	Submitted for Approval	
Comment:		
Addr. Field:*	то	-
Branch:	All Branches	-
		Save

The following fields are required when defining a notification:

- Recipient
- Owner Allows the notification to be sent to the owner of the quote
- Originator Notification sent to the person who initiated the quote
- Assigned Rep Sales Manager Notification will be sent to the sales rep that is assigned to the customer

• Email Distribution List - Allows the notification to be sent to a list of email addresses that are typed into a field

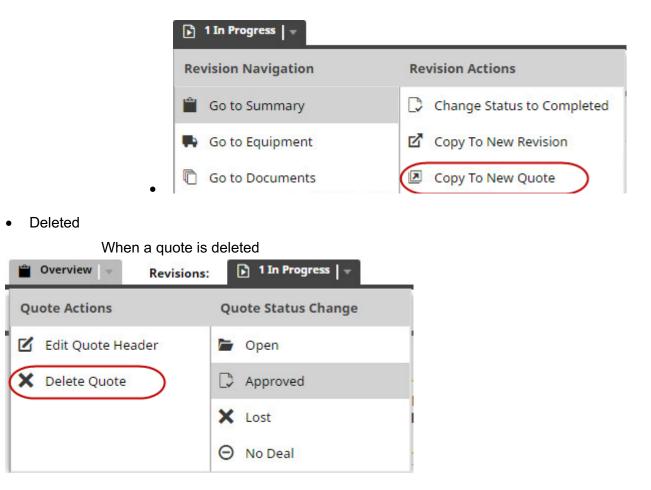
• Select User - Allows the notification to be sent to anyone that is in the active directory.

Once Select User is selected, another field is shown to allow the user to initiate a search

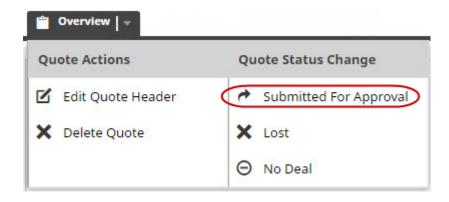
- Event
- Created

Email sent when a new quote is created

The quote could be created from clicking on the **New Quote** button, from Advanced Search or from a quote revision and selecting the Copy to New Quote



• Submitted for Approval - When a quote is set to submitted for approval a notification will be sent out to the person who needs to review the quote and approve it. Quote status can be changed for Submitted for Approval by Selecting the Submitted for Approval change from the quote overview menu.



• When editing the quote header the status can also be set to Submitted for Approval

0 . D . +				
Quote Date:*	Oct 11 2016			
Status:*	Open			
Contract Type:*	Do it for me - hourly	*	CPI:	~

• Approved

When the status of the quote is set to Approved, notifications would be send out. The setting of the status can be accomplished in the following places in a quote. The approved status is set from the quote overview menu.

🖆 Overview 👻	
Quote Actions	Quote Status Change
🗹 Edit Quote Header	🗁 Open
X Delete Quote	Approved
	🗙 Lost
	⊖ No Deal

• When editing the quote header, the status can also be set to Approved.

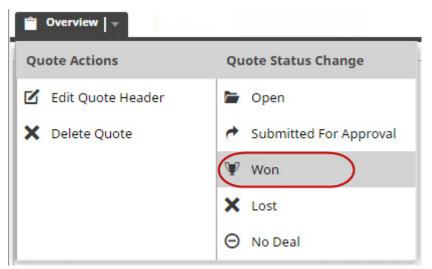
Quote				
Quote Date:*	Oct 11 2016			
Status:*	Submitted For Approval		$\overline{}$	
Contract Type:*	Do it for me - hourly		CPI:	

• Won

Notification sent once a quote status is set to won.

• The setting of the won status can be done in the following places in the app.

Won status set from the overview main menu.



• When editing the quote header the status can also be set to Won

Quote Date:*	Oct 11 2016			
Status:*	Won			
Contract Type:*	Do it for me - hourly		CPI:	~

Address Field

Determines if the email recipient's address will be put in the **TO** and **CC** section.

The following fields are optional:

• Comment

Free form comment used to describe the notification

- Branch
 - Can be used to specify that the notification is limited to a particular branch

Notifications: When Used in CSA Quoter

Notifications are triggered in the background based on when the application event occurs.

How To: Create a Quote

There are two ways to initiate creating a new quote, by clicking on the New Quote button on the main menu and through the Advanced Search. Both of these methods will be defined below.

Create Quote from New Quote Button

- 1. Click 'New Quote'.
 - a. The new quote window is displayed.
 - b. The default fields are filled in.

The Branch, Cost Center, Owner Phone Number, Mobile Number and Fax Number are filled in from the user preference page.

- 2. Complete all Mandatory Fields in the contract information section.
 - a. Choose the appropriate Contract Type.

Note: Event types are directly linked to contract types.

- 3. Search for a Customer **Q**.
 - a. Customers are search by either the customer number or name..
 - b. When the customer is selected the following fields are pre populated
 - i. Customer name
 - ii. Customer number
 - iii. Terms (Charge, Cash COD)
 - iv. Address
 - v. Tax Codes
 - vi. Exempt No
 - vii. Charge Codes

Note: there are no mandatory fields that the user has to enter, all the necessary fields come from the selected customer record.

- 4. Add a Contact
 - Contact
 - a. Contacts are brought in based on the customer influencers
- 5. Click Update- This will bring you to the Add Equipment screen

Note: For a new quote, CSA Quoter will automatically create the initial quote revision and take the user to the add new equipment page

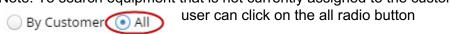
- 6. The next step is to determine if the equipment will be based on an existing serial number or a model.
 - a. If the equipment will be based on a serial number click on the Serial No Based radio button Serial No Based:
 - i. Click on the magnifying glass to initiate the search

Serial No:*

ii. The list of equipment that is assigned to the customer will automatically be shown

Note: To search equipment that is not currently assigned to the customer

the



- iii. To select a serial number click on one of the rows
- iv. The equipment information will be added to the quote
- v. Based on the selected serial number the Serial No Range is automatically selected

Serial No Range:*

005X00001 - 005X99999

- 7. Selecting the correct serial number range is important as it drives the correct standard jobs to be linked to the Event Types
 - a. If the equipment will be based on a model, click on the Model Based radio button Model Based: •
 - i. Click the model drop down or start to type in the model number in the drop down list
 - ii. Select the serial number range from the Serial No Range drop down

Serial No Range:*

- 8. Check PM History: The PM history is used to view the occurrence of previous PM events and can be used to determine the start/end of the contract and the start PM and the start PM hour of the PM.
- 9. Populate the Contract Information Section
 - a. Contract Start and End
 - i. CSA Quoter will allow the start and end of the contract to be selected.

ii. The difference of the start and end hours will drive the length of the contract and be used to calculate the cost per hour of the contract for this serial number.

		Start	End	
🗹 Hour:*	99	\$	2099	\$
Date:				

- b. Contract Additional Information
 - i. To help define the contract in the EMT application, the following information can be entered.
 - ii. Event Trigger: The number of units (Hours, Miles, Kilometers) before a PM is due that the EMT user will be notified.
 - Interval: Used in EMT to define if PM events should be done at the original target SMU or be adjusted based on when the previous PM event was completed.
- 10. Expires By: defines if the contract will expire by Hours/Date or Both whichever comes first.

Event Trigger:	50	hours	
Interval:	Rolling		+
Expires By:	Both		

a. Start of PM: Defines what PM event will be the first for the contract and the number of hours the first event will occur.

Start at PM:	PM 1	.
Start PM Hr:	250	÷

- 11. Click the Go to Events button to select the events to include in the contract
- 12. The events to include in the contract can be added several ways
 - a. A package can be selected, the package will contain a list of Events and the occurrence of each Event
 - i. Choose a Package from the

Package List by clicking on 🕂 button.

Note: Once a package is added it can be removed by clicking on the delete button.

- ii. To view the list of Event and occurrences included in the package click on the Package1 button
- b. Individual Events can be selected.
 - i. On the right side of the Event window the list of Events that are available for this serial number and contract type are displayed. To select an event enter the number of occurrences to include in the contract

PM2	\$397.66	2	\$795.32
-----	----------	---	----------

Note: Events can be removed by unselecting the check box or setting the occurrences to 0.

c. Manual items can be added by clicking on the **Add Manual Event** button

The Add Manual Event popup will show, the following information needs to be entered

- a. Event Name: This name will appear on the quote document
- b. Category: Determines what Event category in the quote and on the quote document the manual event will appear
- c. Occurrences: The number of occurrences to include in the contract
- d. Price: the price to use for each occurrence of the manual event

Note: Manual events are specifically for the corresponding serial number

13. Adjust the Cost Per Hour

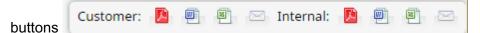
a. Based on the cost per event, the number of events and the length of the contract the cost per hour (CPH) of the contract is calculated and displayed at the bottom of the list of events.

Price:	\$39,570.08	Hours:	2000	CPH:	\$19.79	Adj. CPH:	(+0%)
--------	-------------	--------	------	------	---------	-----------	-------

b. The calculated cost per hour can be adjusted by updating the Adj. CPH field Adj. CPH:

14. Save the Equipment and Events by clicking the **Save** button.

a. Produce the Quote document to review by clicking on one of the following



15. If required, documents can be uploaded to the quote. These are used for reference.

Create a Quote from Advanced Search

Advanced search allows the user to view a list of existing quotes based on a variety of filter criteria. Once the list of quotes is returned the user can click on the New Quote link.

New Quote	20138	τ.	0000	1272545
New Quote	20130	l	open	1372345

Once the New Quote is created, a new quote will be created that includes all the data from the original quote including

- Customer information
- Contact information
- All quote revisions
- All equipment in the revisions
- All events associated to each serial number/model
- Any Cost Per Hour adjustments

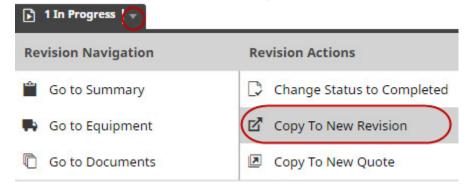
	ServiceLink = PSQuote		_	_			_			_		
	w Quote								g. Demo (Admin	Q, 20132	Q Advar	inced 🗘
Advanced Search												
Make:			 Serial No: 					Model/FR Exchange:				
Branch:			- Cost Cente	ec 🗌	Please select a branch			- Customer:				
Originator:			- Owner:					 PM Code: 				
Dates:	2016-06-19	2019-06-19	III Limit Quot	es to Latest:	50 -							
											Q 5e	earch 5
Quote No	Description	Status	Customer No	Customer Nar		Ouote Date	Describ	Cost Center	Days Outstanding Probability Of Closing	Owner	Creator	naren 🕤
w Quote 20134	250 HR 420 BACKHOE	Open	1000123	JKW CONSTRU		11 Jun, 2019		G&R CORP. OFFICE	8	demouser2 Demo	demouser2 Demo	
w Quote 20133		Open	1056130	TET CONTRAC		23 May, 2019		G&R BEAR INDIRECT CC	27	kablem Demo	kablem Demo	
w Quote 20132		Submitted Fo		TET CONTRAC		17 May, 2019			33	kablem Demo	kablem Demo	\$2
v Quote 20131		Open	1408283	XYZ CONSTRU	ICTION INC	23 Mar, 2019			88	wilkir Demo	wilkir Demo	1
w Quote 20130		Open	1109675	EQX EXCAVATI	ING & UNDERGROUND	14 Mar, 2019	Branch00		97	courtm Demo	courtm Demo	5
w Quote 20129		Open	1109675	EQX EXCAVATI	ING & UNDERGROUND	14 Mar, 2019	Branch00		97	courtm Demo	courtm Demo	
w Quote 20128		Submitted Fo	r Approval 1000416	ZZZ WELL DRI	LLING INC	17 jan, 2019	Branch00		153	wilkir Demo	wilkir Demo	
w Quote 20127		Open	1000352	RDD CONSTRI	UCTION INC	11 Dec, 2018	Branch00	G&R OTHER EQUIP. SHOP	190	brian.martinez Demo	courtm Demo	
w.Quote 20126		Won	1702060	JVC CONSTRU		14 Nov, 2018		G&R: BENSALEM, PA.	86	demouser1 Demo	demouser1 Demo	\$
w Quote 20125		Lost	1582700		ING & UNDERGROUND	05 Nov, 2018		G&R CORP. ADMINISTRATION	2	tdingess Demo	tdingess Demo	\$4
w Quote 20124			r Approval 1582700		ING & UNDERGROUND	06 Nov, 2018			225	tdingess Demo	tdingess Demo	\$4
w Quote 20123		Open	1546385	WWE WELL DR		05 Nov, 2018			225	tdingess Demo	tdingess Demo	
w Quote 20122		Open	1582700		ING & UNDERGROUND	05 Nov, 2018			225	tdingess Demo	tdingess Demo	
w.Quote 20121		Open	1270150	ABO WELL DR		06 Nov, 2018			225	jmayher Demo	jmayher Demo	\$
w Quote 20120	MY FIRST QUOTE TEST DESCRIPTION	Open	1582700		ING & UNDERGROUND	06 Nov, 2018			225	tdingess Demo	tdingess Demo	
w Quote 20119 w Quote 20118	TEST DESCRIPTION TEST DESCRIPTION	Open	1582700	APZ CONTRAC	ING & UNDERGROUND	05 Nov, 2018 06 Nov, 2018			225	jmayher Demo jmayher Demo	jmayher Demo	
w Quote 20117	TEST DESCRIPTION	Open	1652198		ING & amp: UNDERGROUND	29 Oct, 2018		WELD SHOP	233	demouser1 Demo	jmayher Demo demouser1 Demo	
20117 2W Quote 20116		Submitted Fo			ING &: UNDERGROUND	29 Oct, 2018 29 Oct, 2018		WELD SHOP	233	demouser1 Demo	demouser1 Demo	5
w Quote 20115		Won	1652198		ING & UNDERGROUND	26 Oct, 2018		G&R: BENSALEM, PA.	3	demouser1 Demo	demouser1 Demo	5
w Quote 20114		Open	1001148	GAB CONTRAI		25 Sep, 2018			267	demouser1 Demo	demouser1 Demo	
w Quote 20113		Open	1012450	JVS CONTRACT		10 Oct, 2018			252	demouser1 Demo	demouser1 Demo	
w Quote 20112		Open	1001148	GAB CONTRAI		25 Sep, 2018			267	demouser1 Demo	demouser1 Demo	
w Quote 20110		Open	1854773	ZZZ MECHANI	ICAL SERVICES INC	14 Sep, 2018	Branch03		278	wilkir Demo	wilkir Demo	5
w Quote 20109	TESTING	Open	1862087	RON MECHAN	IICAL SERVICES INC	30 Aug. 2018	Branch00	G&R CORP. GENERAL	293	demouser1 Demo	demouser1 Demo	
w Quote 20108		Open	1854773	ZZZ MECHANI	ICAL SERVICES INC	03 Jul, 2018	Branch00	G&R BENSALEM SERV. DEPT.	351	wilkir Demo	wilkir Demo	
w Quote 20107		Open	1010054	PKM CONTRA	CTOR LTD	25 Jun, 2018	Branch02		359	demouser2 Demo	demouser2 Demo	
w Quote 20105	TEST	Won	1348400	IQT WELL DRI	LLING INC	11 Jun, 2018	Branch00	G&R FIELD SVS BENSALEM	15	demouser1 Demo	demouser1 Demo	\$1
w Quote 20105		Open	05	FHJ CONSTRU	CTION INC	10 May, 2018	Branch00		405	kablem Demo	kablem Demo	
ew Quote 20104		Open	1110730	SBE CONTRAC	TOR LTD	26 Apr, 2018	Branch00		419	demouser1 Demo	demouser1 Demo	
w Quote 20103		Open	1582700	DDV EXCAVAT	ING & UNDERGROUND	25 Apr 2018	Branch00		420	demouser1 Demo	demouser1 Demo	5

Create a New Quote Revision

CSA Quoter allows each quote to have more than one revision of quote. Each revision can have a different list of serial numbers/models, and a different set of Events linked to the serial number/model.

To create a new revision:

1. Click on the tab menu from the revision to copy from



2. A popup window will show that will allow the user to create the new revision or not



3. A new revision will be created that contains all the information that was part of the original revision.

How To: Add Equipment to a Quote

Each revision of the quote can have one or more equipment associated with the revision. To add a new piece of equipment, follow the below steps.

- 1. Click the + Add Equipment button.
- 2. The next step is to determine if the equipment will be based on an existing serial number or a model.

- a. If the equipment will be based on a serial number, click on the Serial No Based radio button Serial No Based:
 - Click on the magnifying glass to initiate the search
 Serial No:*
 - ii. The list of equipment that is assigned to the customer will automatically be shown.

Note: To search equipment that is not currently assigned to the customer, the user can click on the All radio button



- iii. To select a serial number click on one of the rows.
- iv. The equipment information will be added to the quote.
- v. Based on the selected serial number, the Serial No Range is automatically selected.

```
Serial No Range:* 005X00001 -
```

- 005X00001 005X99999
- vi. Selecting the correct serial number range is important as it drives the correct standard jobs to be linked to the Event Type,s
- b. If the equipment will be based on a model, click on the Model Based radio button, Model Based: •
 - i. Click the model drop down or start to type in the model number in the drop down list.
 - ii. Select the serial number range from the Serial No Range drop down.

Serial No Range:*

- 3. Check PM history: The PM history is used to view the occurrence of previous PM events and can be used to determine the start/end of the contract and the start PM and the start PM hour of the PM.
- 4. Populate the Contract Information Section.
 - a. Contract Start and End
 - i. CSA Quoter will allow the start and end of the contract to be selected.
 - ii. The difference of the start and end hours will drive the length of the contract and be used to calculate the cost per hour of the contract for this serial number.

		Start	End	
🗹 Hour:*	99	\$	2099	\$
Date:				

b. Contract Additional Information

To help define the contract in the EMT application the following information can be entered

- I. Event Trigger: The number of units (Hours, Miles, Kilometers) before a PM is due that the EMT user will be notified
- II. Interval: Used in EMT to define if PM events should be done at the original target SMU or be adjusted based on when the previous PM event was completed
- III. Expires By: defines if the contract will expire by Hours/Date or Both whichever comes first

Event Trigger:	50	hours	
Interval:	Rolling		*
Expires By:	Both		

c. Start of PM: Defines what PM event will be the first for the contract and the number of hours the first event will occur.

Start at PM:	PM 1	
Start PM Hr:	250	\$

- Click the Go to Events button to select the events to include in the contract
 Go to Events
- 6. The events to include in the contract can be added several ways
 - a. A package can be selected, the package will contain a list of Events and the occurrence of each Event
 - i. Choose a Package from the

Package List

by clicking on 🔳 button

Note: Once a package is added it can be removed by clicking on the delete button.

- ii. To view the list of Event and occurrences included in the package click on the Package1 button
- b. Individual Events can be selected
 - i. On the right side of the Event window the list of Events that are available for this serial number and contract type are displayed. To select an event, enter the number of occurrences to include in the contract.

\checkmark	PM2	\$397.66	2	\$795.32

Note: Events can be removed by unselecting the check box or setting the occurrences to 0

- c. Manual items can be added by clicking on the **Add Manual Event** button
 - i. The Add Manual Event popup will show, the following information needs to be entered
 - i. Event Name: This name will appear on the quote document
 - ii. Category: Determines what Event category in the quote and on the quote document the manual event will appear
 - iii. Occurrences: The number of occurrences to include in the contract
 - I. Price: the price to use for each occurrence of the manual event

Note: Manual events are specifically for the corresponding serial number

- 7. Adjust the Cost Per Hour
 - a. Based on the cost per event, the number of events and the length of the contract, the cost per hour (CPH) of the contract is calculated and displayed at the bottom of the list of events

Price	\$39,570.08	Hours:	2000	CPH:	\$19.79	Adj. CPH:	(+0%)
b. The calculat Adj. CPH:	ed cost per h	our can	be adjı	isted by up	dating th	ne Adj. CPH field	
				Sava			

8. Save the Equipment and Events by clicking the **Equipment** button

How To: Add/Edit Events to an Existing Equipment/Model

Once equipment or models have been added to a quote revision the associated Events can be added or modified by following the below steps

- 1. Click the **Edit Events** button on the revision page
- 2. The events to include in the contract can be added several ways
 - a. A package can be selected, the package will contain a list of Events and the occurrence of each Event
 - i. Choose a Package from the Package List by clicking on

Note: Once a package is added it can be removed by clicking on

the delete < button

- ii. To view the list of Event and occurrences included in the package click on the Package1 button
- b. Individual Events can be selected
 - i. On the right side of the Event window the list of Events that are available for this serial number and contract type are displayed. To select an event enter the number of occurrences to include in the contract

\checkmark	PM2	\$397.66	2	\$795.32
--------------	-----	----------	---	----------

Note: Events can be removed by unselecting the check box or setting the occurrences to 0.

- c. Manual items can be added by clicking on the **Add Manual Event** button
 - i. The Add Manual Event popup will show, the following information needs to be entered

Event Name: This name will appear on the quote document

- 1. Category: Determines what Event category in the quote and on the quote document the manual event will appear
- Occurrences: The number of occurrences to include in the contract
- 3. Price: the price to use for each occurrence of the manual event

Note: Manual events are specifically for the corresponding serial number

- 3. Adjust the Cost Per Hour
 - a. Based on the cost per event, the number of events and the length of the contract the cost per hour (CPH) of the contract is calculated and displayed at the bottom of the list of events.

Price:	\$39,570.08	Hours:	2000	срн:	\$19.79	Adj. CPH:		(+0%)
b. The calculate	d cost per ho	our can	be adjusted	l by up	odating the A	dj. CPH fie	eld	
Adj. CPH:								

4. Save the Equipment and Events by clicking the **Save** button

How To: Edit Equipment Information

Once equipment have been added to a quote revision the related information can be modified by following the below steps

Note: if the serial number/model or the Serial No Range related to the current equipment is changed the associated Events will be removed from the quote and need to be entered again.

- 1. Click on the **Edit Equipment** button
 - a. The steps below outline the process to change any of the equipment information
- 2. The next step is to determine if the equipment will be based on an existing serial number or a model
 - a. If the equipment will be based on a serial number click on the Serial No Based radio button Serial No Based: •
 - Click on the magnifying glass to initiate the search Serial No:*
 - ii. The list of equipment that is assigned to the customer will automatically be shown

Note: To search equipment that is not currently assigned to the customer the user can click on the All radio button



- iii. To select a serial number, click on one of the rows
- iv. The equipment information will be added to the quote

v. Based on the selected serial number the Serial No Range is automatically selected

Serial No Range:*

```
005X00001 - 005X99999
```

Note: Selecting the correct serial number range is important as it drives the correct standard jobs to be linked to the Event Types

- b. If the equipment will be based on a model, click on the Model Based radio button Model Based: •
 - i. Click the model drop down or start to type in the model number in the drop down list
 - ii. Select the serial number range from the Serial No Range drop down

Serial No Range:*

- 3. Check PM History: The PM history is used to view the occurrence of previous PM events and can be used to determine the start/end of the contract and the start PM and the start PM hour of the PM.
- 4. Populate the Contract Information Section
 - a. Contract Start and End
 - i. CSA Quoter will allow the start and end of the contract to be selected.
 - ii. The difference of the start and end hours will drive the length of the contract and be used to calculate the cost per hour of the contract for this serial number



b. Contract Additional Information

To help define the contract in the EMT application, the following information can be entered

- 1. Event Trigger: The number of units (Hours, Miles, Kilometers) before a PM is due that the EMT user will be notified
- Interval: Used in EMT to define if PM events should be done at the original target SMU or be adjusted based on when the previous PM event was completed

 Expires By: defines if the contract will expire by Hours/Date or Both whichever comes first

Event Trigger:	50	 hours	
Interval:	Rolling		*
Expires By:	Both		

c. Start of PM: Defines what PM event will be the first for the contract and the number of hours the first event will occur

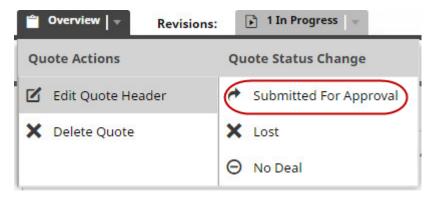
Start at PM:	PM 1	•
Start PM Hr:	250	*

How To: Approve a Quote

Once a quote has been created and it is time to have the quote approved the following steps below outline the process:

Overview

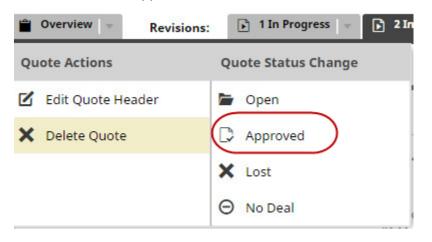
- 1. Click on the Quote Overview tab menu
- 2. Select the Submitted for Approval menu item



3. A popup will be shown to ensure the user wants to submit the quote for approval

Change Quote Status	⊗
Are you sure you want to change the quote status to Submitted For Approva	?
Yes No	

- 4. Based on CSA Quote status notification definitions the manager will receive an email notifying them of that the quote needs to be approved
- 5. The manager will pull up the quote in CSA Quoter
- 6. Once the quote has been reviewed it can be approved by clicking on the Overview tab menu
- 7. Select the Approved menu item

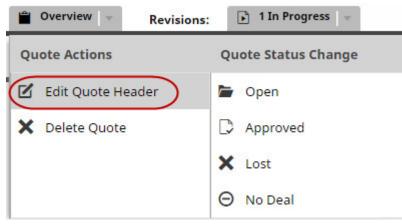


Note: Setting the status of the quote to Submitted for Approval or Approved can be done by also editing the quote header, follow the steps below:

1. Click the Overview tab menu



2. Click the Edit quote header from the menu



3. Change the status in the drop down list

Quote Date:*	Jan 03 2017	
Status:*	Submitted For Approval	-
Contract Type:*	Open	
	Submitted For Approval	
Branch:*	Lost	
Cost Center:	No Deal	
Description:	Approved	

How To: Create a New Event

The Events that can be added to a quote are managed within CSA Quoter in the Admin Management module. It is important to understand how the information associated to an event is used when creating a quote for specific serial number of model.

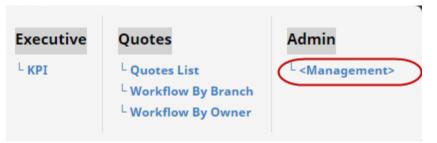
Below is a definition of the important terms

- Event Type
- An Event Type is a generic definition of a PM event that is added to quotes
 - The Event Types are used to build packages
 - The Event Types also show as individual items on the Event List that is associated to a piece of equipment on a quote revision
- An Event Type is not directly associated to a serial number or model
- Standard Jobs
 - Standard jobs are imported from DBS
 - Standard jobs define the standard cost of repair options
 - Standard jobs are associated to a serial number range and model
- SMCS Codes
- SMCS codes are used in Standard Jobs and DBS work order segments to define a repair service
- The common SMCS codes are
 - Job Code: what action is being performed in the repair option
 - Component Code: what part of the equipment is the work being done on

- Modifier Code: Allows to further define the part of equipment the service is being done on
- There are 6 other SMCS codes but are not used that often
- Below is an explanation how an Event Type is linked to a Standard Job that is tied to a serial number and how the correct costs are shown in a quote
 - The Event Type is defined by assigning the SMCS Job Code, Component Code and possibly the Modifier Code to the Event Type
 - When DBS standard jobs are imported into CSA Quoter a matching algorithm is used to look at all the Standard Jobs and based on the associated SMCS codes link the Standard Job to the appropriate Event Type
 - When creating a quote a serial number or model is defined
 - The serial number or model is then used to determine the standard jobs that match
 - Based on the matched standard jobs the Event Types that are linked to the standard jobs are shown with in the quote
 - The costs are taken from the linked standard job

To create a new Event Type follow the steps below

- 1. Click on the main module menu CSAQuoter
- 2. Navigate to the Admin Management module



3. Click on the Event Type menu item

Event		
Event Types		
Standard Jobs		
Flat Rate Exchange		
Additional Events		
Packages		
Categories		
Quote		
Contract Types		
Management		
Notification		
	1	
4. Click the 🕇 Add Typ	button	
5. Type in the descripti	ion of the Event Type	
Event Type:*		
	egory to associate with this Event Type	
Category:*	· · · · · · · · · · · · · · · · · · ·	
-	re defined with the CSA Quoter admin m	
b. Categories a quote docum	re used to group Event Types together ir	the quote and in the
	b Code to associate with this Event Type	ž
Job Code:*		
8. Select the SMCS Co	omponent Code to associate with this Eve	ent Type
Component Code:*		
9. If necessary select t	he SMCS Modifier Code to associate with	h this Event Type
Modifier:	 ;	

10. If necessary select one or more contract types to limit this Event Type to

Restrict by Contract	
Type:	

11. Set the sort order for the event, this is used to determine where in the list of events this Event Type should be placed

Sort Order:*

APPENDIX A

Definitions

D4M (Do It for Me): We have a relationship with this customer with possible CSA's and maintenance agreements on the majority of his fleet. This customer uses our shops and field mechanics almost exclusively to look after his equipment and purchase the majority of his equipment parts from the Dealer.

WWM (Work with Me): This customer will pick and choose the work that he has the Dealer perform for him and will utilize other means for the rest. He may have his own mechanic and shop for certain aspects of equipment maintenance. Generally the Dealer might do the major PM's for the customer.

DIM (Do It Myself): This customer prefers to do the work himself with his own mechanics, or at another shop facility other than the Dealer. He will shop his parts around, uses "will-fit" and nor service labor except for warranty work.

CPH: Cost Per Hour

Standard Job: Based on equipment families, models and serial number ranges show the standard jobs that match Event Types

Page is meant to show Event Type coverage for families/models and serial number ranges

Event Types associated with a standard job can be disabled

Flat Rate Exchange: Based on the flat rate exchange repair options show which ones match event types.

Similar page to the Standard Job page and is meant to show what flat rate exchange repair options match Event Types.

Categories: Categories are used when building the quote or when creating the quote document to group and sort the different areas of the quote. In the application and on the quote document events will be shown by the sort order that is defined in each category and the sort order of the events and additional events that have been defined. Event Types and Additional items are assigned to a category.

Events: Used to define items that can be included in a CSA Quote, but are not linked to standard jobs, can be linked to quote categories. Additional events can be enabled or disabled, Can be linked to SMCS codes, but not mandatory.

Default Pricing is entered manually and can include store pricing. When creating a quote it is possible to override the price of the additional event. This depends on the definition of the additional event.

Packages: Packages provide a way to group Events and Additional events together, to make quoting common groups of events together, Packages can be enabled/disabled, Packages are tied to one type of contract, Packages can include any Event Type of Additional Event, and Packages also include the number of occurrences that are included for each event.