Sales Operations

CSA Quoter

USER GUIDE

Updated June 19, 2019

UPTAKE

Table of Contents

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 This user guide will be updated on an ongoing basis and may have slightly outdated content due to the frequency of software updates.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.

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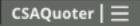
The Personalize Button allows the user to enter in a variety of personal information that is used when creating a quote.
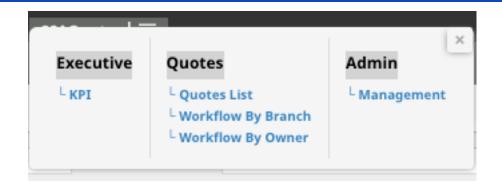

CSA Quoter: Main Menu

The main menu is used to navigate the various sections of CSA Quoter, including:
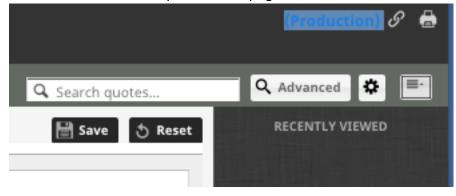
- KPI
  - o View of a variety of application metrics
  - o Each metric can be drilled into to view the details that contributed the KPI
- Quote List
  - o List of existing quotes
  - o List can be filtered
- Workflow By Branch
  - o Listing of a summary of the number of quote and values by branch
  - o 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
  - o 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.

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

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.

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.

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.

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

Quote Revision(s)

Equipment(s)

Quoted Events

Packages	Events Types	Additional Events	Manual Events

Event/Additonal Event Types & Occurences	DBS Std Jobs FR Exchange

Event Types	Additional Events

DBS Std Jobs FR Exchange

Legend

User Accessible
PM Quoter Admin 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.

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.

Key Fields

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.

Key Fields

How many Revisions or quotes are included.

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.

Key Fields

- **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.

Key Fields

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

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.

Enter a cost per hour value to overwrite the current rate.
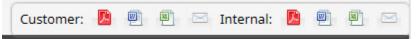
Delete of add a package with the Actions Menu

Expand and collapse selection

QUOTE DOCUMENT

Overview

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

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 on 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 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 on 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

KPI

Overview

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

Key Fields

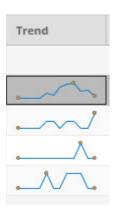View the period of activity and change from calendar to fiscal by using the menu items.

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

Filter by Branch and Cost Center.

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.

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:
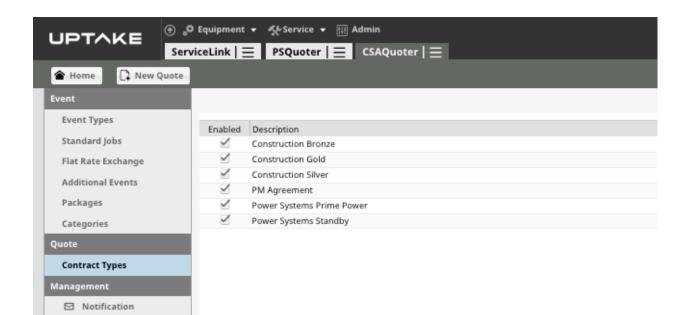• Do It For Me

- o   The dealer does all the work associated with the contract items, including parts and labor.
- Do It With Me
    - o   The customer will be responsible to do some of the contract events and the dealer will do the other contract events.
- Do It Myself
    - o   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.
    - o   This is shown on the quote overview page.
- An indicator if the contract type is enabled or not.

Contract Types: Where Used in CSA Quoter

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

- Assigned to the contract header

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

- On the quote document

Package management pages

- 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

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

- Event Add/Edit Page

- Events Edit Page

- Assigned to the Event Type

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

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

(COMBINE)

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

- Quote document

- Package definition admin page

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.

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.

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.

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.

Flat Rate Exchange Add Local FR Exchange

A local flat rate exchange can be added by clicking the 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.

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.

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.

Additional Event Management Page

An Additional Event can be modified by clicking on the [pencil icon] 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

Additional Events: Where Used in CSA Quoter

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

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.

Packages Management Page

To add a new Package click on the [Add Package] button, to edit an existing Package click on the [icon] symbol.

Packages: Where Used in CSA Quoter

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

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 ✖ symbol.

Notification Management Page

From the Notification Listing page the user can edit an existing notification by clicking on the ✎

symbol or add a new notification by clicking on the **Add** button.

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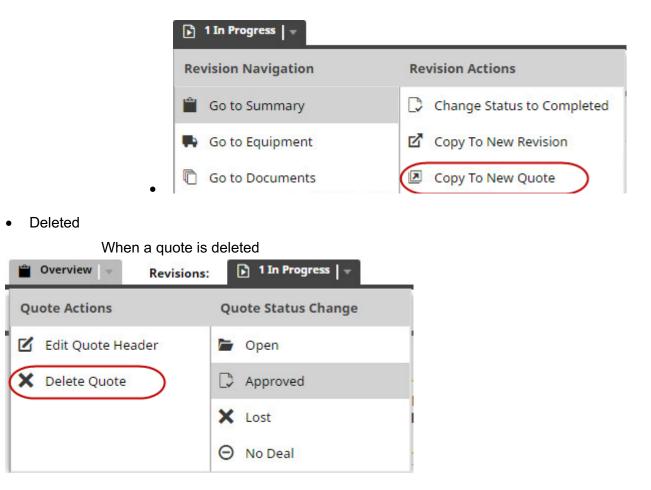
- **Select User** - Allows the notification to be sent to anyone that is in the active directory.

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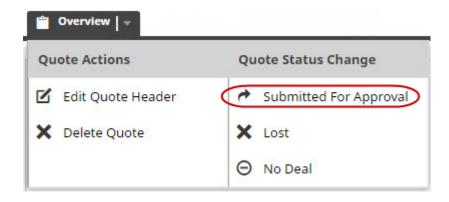
- **Event**
- **Created**

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

- •

- • Deleted

When a quote is deleted

- • 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

- 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.

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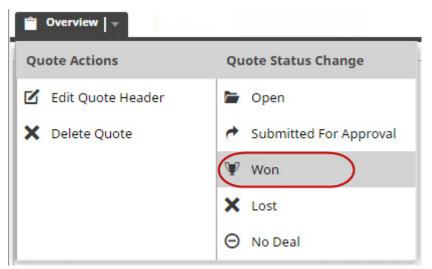
- Won

  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

- 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

    o 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 .

    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

    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 ⃝ By Customer ⊙ All   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 ▼]

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.

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.

   iii. 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.

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.

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

buttons

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.

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

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 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: ⦿

    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.

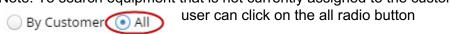   Note: To search equipment that is not currently assigned to the customer, the user can click on the All radio button

        ◯ By Customer ⦿ All

    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   ▼]

    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.

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

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.

5. Click the Go to Events button to select the events to include in the contract

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.

✓	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

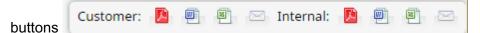7. Adjust the Cost Per Hour

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

    Adj. CPH: [   ]

8. Save the Equipment and Events by clicking the 💾 **Save** 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 ➕ 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

        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

            2. 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: $59,570.08   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: [   ]

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: ⊙

        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 user can click on the All radio button
            ○ By Customer   ⊙ All

        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

                  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

         1. Event Trigger: The number of units (Hours, Miles, Kilometers) before a PM is due that the EMT user will be notified

         2. 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

3. 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
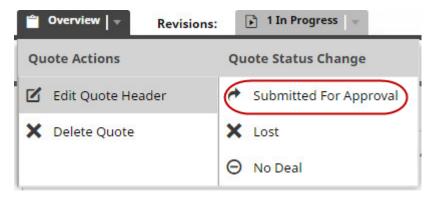
Start at PM:	PM 1 ▼
Start PM Hr:	250 ▲▼

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:
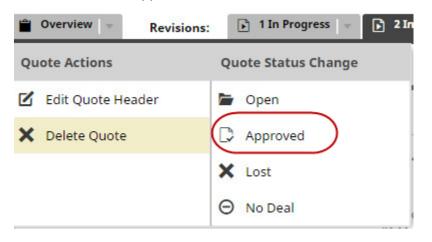
1. Click on the Quote Overview tab menu 📋 Overview ▼

2. Select the Submitted for Approval menu item

📋 Overview ▼	Revisions:	▶ 1 In Progress ▼
Quote Actions		**Quote Status Change**
✎ Edit Quote Header		➔ Submitted For Approval
✖ Delete Quote		✖ Lost
		⊖ No Deal

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 Approval?

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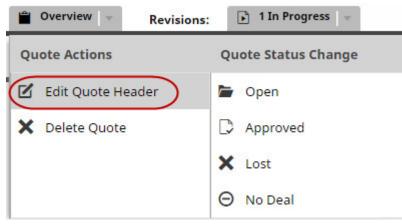
Note: Setting the status of the quote to Submitted for Approval or Approved can be done by also editing the quote header, follow the steps below:

1. Click the Overview tab menu

2. Click the Edit quote header from the menu

3. Change the status in the drop down list

4. Click the button

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.
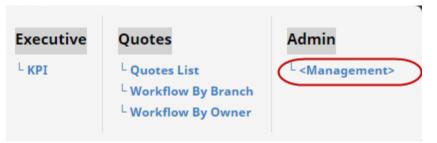
Below is a definition of the important terms

- 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

2. Navigate to the Admin Management module

3. Click on the Event Type menu item

4. Click the [+ Add Type] button
5. Type in the description of the Event Type

Event Type: *

6. Select the Event category to associate with this Event Type

Category: *

    a. Categories are defined with the CSA Quoter admin menu
    b. Categories are used to group Event Types together in the quote and in the quote document

7. Select the SMSC Job Code to associate with this Event Type

Job Code: *

8. Select the SMCS Component Code to associate with this Event Type

Component Code: *

9. If necessary select the SMCS Modifier Code to associate with 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.