Asset IO for Dealer Inventory

USER GUIDE

Updated June 13, 2019

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INVENTORY USER GUIDE

DISCLAIMER

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 This user guide will be updated on an ongoing basis and may have slightly outdated content due to the frequency of software updates.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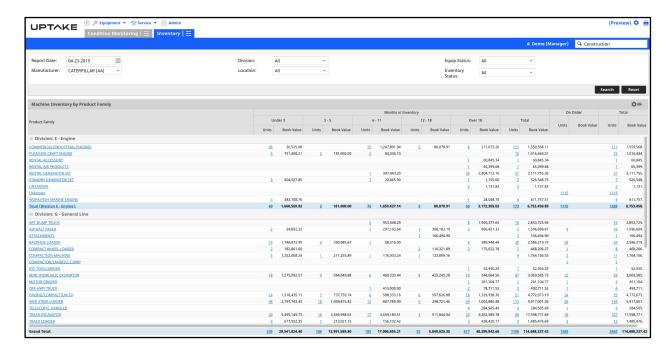
CUSTOMIZATION

This user guide will show you how to use the Inventory 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.

INVENTORY

Log in to CloudLink with your Username and Password, then click the **[ENTER]** button under **Inventory**.

The Inventory page is a repository of Machine Inventory. It provides visibility into the types of equipment in inventory, number of units in inventory, and their book value broken down by **Product Family**. Columns sort the equipment into **Months in Inventory** periods, **On Order**, and **Total**. This information can be filtered using the menus at the top of the list.



Note: Data shown is determined by user role. Public users cannot see book values or make changes. Manager users are able to see book values and make changes.

Search for Specific Equipment

The Search field in the top right of the Inventory page allows you to search for specific equipment. Enter your query in the Search field.



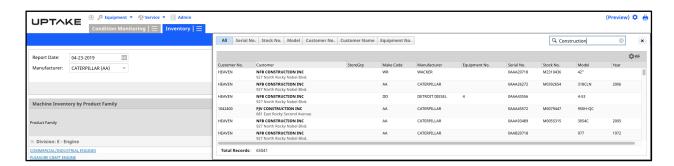
The Search table appears. It is set automatically to view all results. Narrow results by selecting one of these buttons in the top left of the table:

- Serial Number
- Stock Number
- Model
- Customer Number

- Customer Name
- Equipment Number

The results sort into columns:

- Customer Number
- Customer, Store Group
- Make Code
- Manufacturer
- Equipment Number
- Serial Number
- Model
- Year



Filtering Inventory Searches

The top section of the Inventory page allows you to filter your inventory by the following fields:

- Report Date
- Manufacturer
- Division
- Location
- Equipment Status
- Inventory Status.

Note: **Division**, **Location**, **Equipment Status** and **Inventory Status** are customized based on your dealership. **Manufacturing** and **Location** derive from DBS.

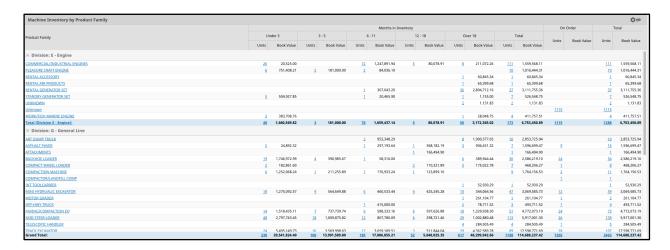
To filter your inventory:

- Click the field next to the filter category for a menu and select your filter.
- After you have selected your filter categories press [Search].
- Filtered equipment displays.
- Reset your search and see all your inventory by pressing [Reset].



In Inventory List:

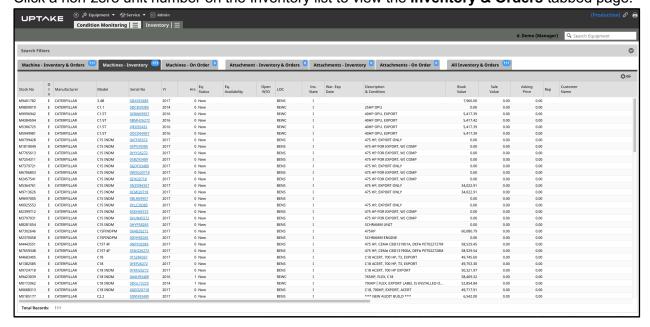
- Click a column header to sort the table by that column.
- Click the **Gear l**icon to reload a grid, export grid contents to Excel, save your grid configuration, or reset your grid configuration.
- Click the **Eye ■** icon (next to the Gear icon) to toggle column visibility on and off.
- Columns sort the equipment into Months in Inventory periods, On Order, and Total.



Analyzing Inventory

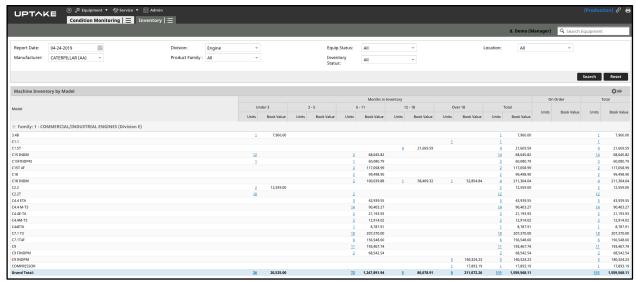
Product Family names and non-zero unit numbers in the Inventory list are clickable.

Click a non-zero unit number on the Inventory list to view the **Inventory & Orders** tabbed page.



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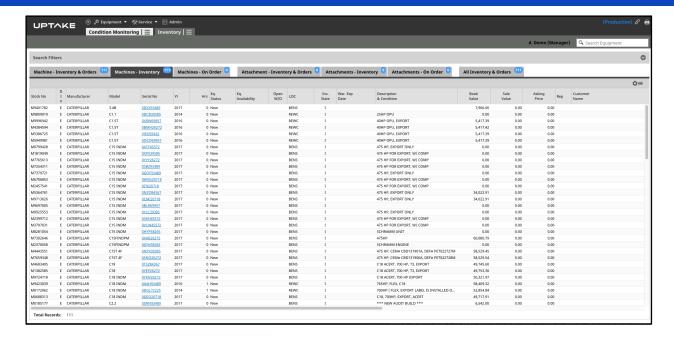
Click a Product Family name on the Inventory list to be brought to the **Machine Inventory by Model l**ist. It displays a list of all equipment in that family, with columns showing Months in Inventory, On Order, and Total. Book Value data is displayed for those with a Manager user role.



Clicking a non-zero number on the **Machine Inventory by Model** list will bring you to the **Inventory & Orders** tabbed page.

The **Inventory & Orders** tabbed page allows you to view lists sorted by the topic. The number in the blue badge next to the tab title indicates the number of units within the topic. Tab topics are:

- Machine Inventory & Orders
- Machines Inventory
- Machines On Order
- Attachment Inventory & Orders
- Attachments Inventory
- Attachments Order
- All Inventory & Orders



Click on a serial number to view detailed information on that equipment. See the EquipmentLink section of the Condition Monitoring Portal User Guide for more details.

To filter the **Inventory & Orders** tabbed page:

- Click the down arrow on the top right to bring up the **Search Filters** menu.
- Click the field next to the filter category for a menu and select your filter.
- After you have selected your filter categories press [Search].
- Filtered equipment displays.
- Reset your search and see all your inventory by pressing [Reset].



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