

A large, light blue chevron graphic pointing upwards, centered on the page. It consists of two overlapping triangles forming a larger triangle shape.

Sales Operations
Parts & Service Quoter

USER GUIDE

Updated June 12, 2019

UPTAKE

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DISCLAIMER

We update Parts & Service 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 This user guide will be updated on an ongoing basis and may have slightly outdated content due to the frequency of software updates.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 Parts & Service Quoter application with the assumption that your dealership has made the migration to CloudLink and your Parts & Service Quoter 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.

Introduction

Welcome to Parts and Service Quoter (PSQ). This application allows you to develop quotes for presentation to customers.

NOTE: PSQ currently only supports the Google Chrome browser.

Parts and Service Quoter

Log in to CloudLink with your Username and Password, then click the **[ENTER]** button under **Parts & Service Quoter**. You will be taken to the PSQ Home page.

The screenshot shows a web application interface for the Parts and Service Quoter. At the top, there are filter options for 'Owner', 'Changed By', and 'Last Changed'. Below the filters is a table titled 'Quote List' with the following columns: Quote ID, Owner, Status, Changed By, Submitted, Submitted Date, Status, Price, Order No., Quote Date, Processing Stage, SFP, Owner, MFG/Plant, Line No., and Approval Date. The table contains numerous rows of data representing different quotes.

Home

The Home page displays a list of quotes that require action. Filter quotes by status, owner, division, and to find the quote you are looking for.

The Status column allows you to see which quotes require attention. The status column definitions are as follows:

- **Open:** Quote is being developed or has not yet been presented to the customer.
- **Submitted for Approval:** Quote has been given to customer for approval.
- **Won:** Customer accepted the quote and the quote is ready to create or link to a work order in DBS.
- **Lost:** Quote has been rejected by customer
- **No Deal:** Customer or Sales Rep has cancelled quote for reasons other than rejected.

Change the status of a quote from the Home page by clicking the gear icon in the status and select the desired status.

Note: If the quote is associated with an opportunity, the stage of the opportunity will also change to match the stage of the quote.

Click the eye icon to configure the columns displayed in the list.

Click the gear icon in the upper-right corner of the Quote list to reload or export the list, and to save or reset the column configurations.

Navigate back to the home page from anywhere in the application by clicking **[Home]** in the Navigation Bar.



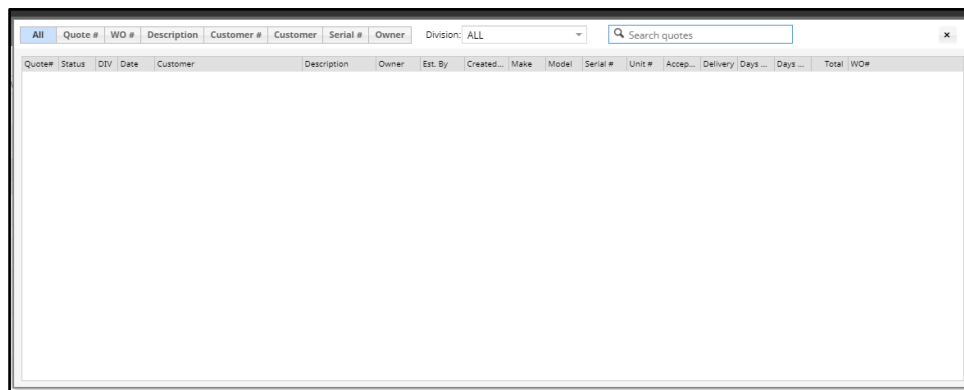
See a Quote's details by clicking on the quote number.

Navigation Bar



At the top of the screen is a navigation bar that can be accessed from anywhere in the application. Create a new quote, search quotes, personalize PSQ, and access recently viewed quotes using the Navigation Bar.

Search




For a basic search using a quote number, customer name, or any of several other criteria, use the search field, located in the Navigation bar. Quotes in the resulting list can be sorted by clicking any of the column headers and the quotes can be filtered using the status of the quote or the date range in which it was created.

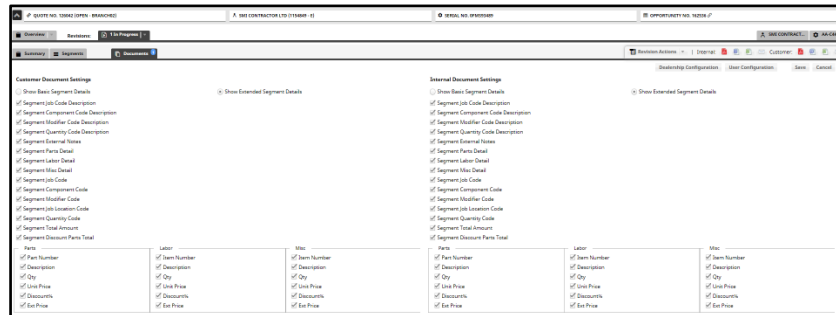
Advanced Search



Advanced Search can be helpful when trying to create a new quote based on an existing Standard Job, work order, or quotes. Click the **[Advanced]** button on the navigation bar to access the Advanced Search page. On this page, you can search with more specific criteria. Once the desired result is located, a new quote can be created from this screen.

Personalize PSQ

Click the gear  icon to configure your PSQ settings. Select your default division, branch, cost center, contact information, document settings, and quote information.



Creating a New Quote

Creating a Quote from a Source

To create a new quote using customer and/or equipment information:

1. Click **[New Quote]**.
2. In the window that appears, begin by typing at least two characters in the search field. Use the tabs along the top to filter and search by a specific category.
3. Once you find the record you would like to quote, click on the appropriate icon with the action you would like to take.




- Create a new quote with a customer



- Create a new quote with equipment



- Create a new quote with a customer and equipment

4. After selecting the desired action, enter the remaining details on the Quote Overview page.
5. Fill out the required fields.
6. If searching for a customer, click the magnifying glass in the customer information section. Search either the customer name or number and select a customer to see all the customer general information, contacts, and equipment.
7. To choose the equipment from a customer's list, you can filter by selecting the CAT Equipment, Other Equipment, Rental or All Equipment buttons.
8. Search for equipment to add to the quote by clicking the magnifying glass in the equipment section. Filter the fields in the search modal by clicking the eye  icon.



9. Select the box in the Opportunity section if you would like an Opportunity created from this quote, or if you would like to associate this quote with an existing Opportunity.
 - To associate the quote with a new Opportunity, select **Create New Opportunity** in the Opportunity Number field and enter the Opportunity information. To associate the quote with an existing Opportunity, select the desired quote in the Opportunity Number field.
10. Click the **[Update]** button in the bottom right corner to save the quote details.

Click on a Customer Number to view details regarding that customer.

Click on a number in a month column to view all activities completed for that customer during that month.

To filter the table:

1. Select the fields you want to filter by.
2. Select how far back in time you want to filter.
3. Click the **[Filter]** button.

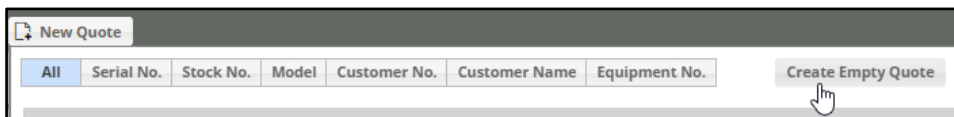
Export the table into an Excel spreadsheet by clicking the **[Export]** button at the top right of the table.

Creating an Empty Quote

You can also create an empty quote in order to manually enter the quote information.

To create a new empty quote:

1. Click **[New quote]**.
2. In the Create Quote modal that appears, click the **[Create Empty Quote]** button.



3. Enter the quote details on the Quote Overview page.
4. Select the checkbox in the Opportunity section if you would like an Opportunity created from this quote, or if you would like to associate this quote with an existing Opportunity.
 - To associate the quote with a new Opportunity, select **Create New Opportunity** in the Opportunity Number field and enter the Opportunity information. To associate the quote with an existing Opportunity, select the desired quote in the Opportunity Number field.
5. Click the **[Update]** button in the bottom right corner to save the quote details.

Quote Details Page

Overview

Quote Date: Apr 09, 2019
Quote Status: Open
Description: THIS IS A TEST
Branch: BRANCH02
Case Center: GARYFIELD SERV ALLENTOWN
Owner: Eric Ellis
Secondary Phone No: 2121011489
SRM Owner: N
Comments:

Customer

Customer: SME CONTRACTOR LTD(154849)
PO No: 154849
Address: 683 SOUTH BODDY COUNTRY AVENUE
City/State: ANNISTON/TN/35
Phone: 2121090209
Fax Code: 73
Example No: N
Charge Code: F3
Procuring: N
Wager:

Opportunity

PO Req: N
Term: Charge(2)
HOS

Equipment

Serial No: 07M35489
Manufacturer: CATERPILAR
Model: C44
Unit No: ENJ08
Division: E - Engine
Product Type: O - OTHER
S/N: 07M35489
Last Known: 4 hours on Jul 10, 2017
S/N: 4 hours on Jul 10, 2017
C/S Type: N/A
Arrangement: N/A
Job Site: N/A
Description: N/A
Address: N/A
City/State: N/A
ZIP: N/A
Phone: N/A

Phone: 31242230
Email: SUPPORT@UPTAKE.COM

View Quote details including Customer, Opportunity, and Contact information in the overview tab. A collapsible header displays a general overview of the quote.

Customer: SME CONTRACTOR LTD

Physical Address: 683 South Boddy Country Avenue, Anniston, TN 35810
Phone: 2121090209
Fax: 73
Website: www.smecontractor.com

Division Details

Division Name: SME A - INDIVIDUAL AND FAMILY SOCIAL SERVICE (302)
Created On: Jul 09, 2019

Click the tab displaying the customer's name to view the customer's information.

Equipment: 07M35489

Serial No	Model	Unit No	Division
07M35489	C44	ENJ08	E - Engine

Attachments

Configuration

Condition Monitoring

View equipment information by clicking the tab displaying the name of the equipment. This tab shows everything from the current owner of the equipment to the Service letters associated with the equipment.

Equipment: 07M35489

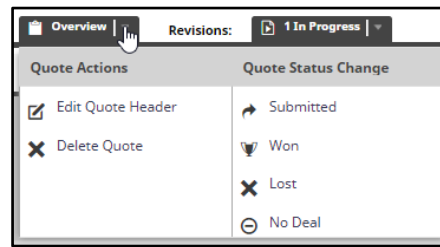
Serial No	Model	Unit No	Division
07M35489	C44	ENJ08	E - Engine

Attachments

Configuration

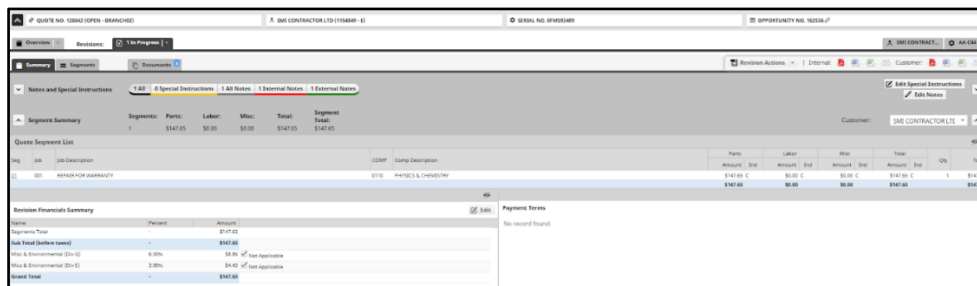
Condition Monitoring

Editing a Quote



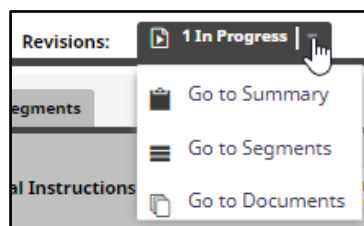
Click the drop down arrow on the overview tab to take action on a quote. You can edit, delete, or change the status of a quote from this menu. Click **Edit Quote** to make changes on the Quote Overview page.

Revisions



Keep track of changes to quotes and their statuses and prepare multiple versions of a quote with Revisions. You may choose to give the customer with several different pricing options by presenting them as separate Revisions. This allows you to keep all of the existing customer and quote details in place.

Revisions are displayed by status, as a tab, next to the Quote Overview tab. Click the drop down arrow on a Revision tab to jump to the Summary, Segments, and Documents associated with that Revision.



To change the status of a revision to complete, copy the revision as a new revision, or copy the revision to a new quote by clicking the drop down arrow on the **[Revision Action]** button. You can also export the internal and external versions of the quote from the Revision tab.

If all the additions and changes to the revision are done, the revision can be marked as complete. This status change is useful when there are multiple revisions on the same quote. This allows for all the revisions to be completed before submitting the quote to the customer.

Summary Tab

The Summary tab contains the notes and special instructions which can be added to either the internal or customer document.

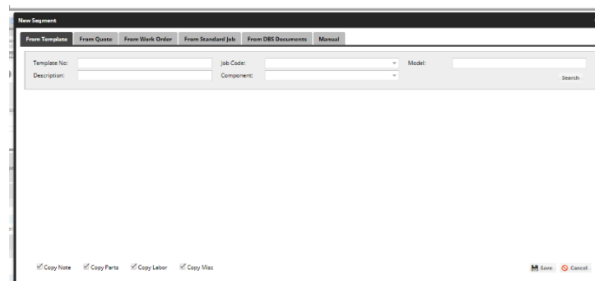
Segments Tab

The Segments tab allows you to view, add, and delete the segments associated with the revision. Segments can be added to a quote from an existing source or manually. A segment can be added from the following sources:

- A template
- An existing quote
- A Work Order
- A Standard Job
- DBS documents

To add a Segment from an existing source:

1. Click on the **[New Segment]** button to open the **New Segment** modal.
2. Click on the appropriate Source tab.
3. Use the search fields to find the desired source.
4. Once the desired source has been found, use the drop down fields to select the appropriate Store and Cost Center.
5. Click the **[Save]** button.



To create a Segment manually:

6. Click on the **[New Segment]** button to open the **New Segment** modal.
7. Click on the **Manual** tab.
8. Fill in the required fields.
9. Click the **[Create]** button.

There are three options to calculate the total of a segment:

- **Time and Material:** The sum of the total of parts, labor and miscellaneous.
- **Flat Rate:** Enter the cost in the Total Amount column and the variance will be calculated based on the flat-rate amount minus the total of parts, labor and miscellaneous.
- **Estimated:** An amount can be entered in the parts total box (even without any parts) and the field will automatically populate.

Adding and Editing Parts

Click the **[Edit Parts]** button to add and edit parts. The **Edit Parts** window appears; add and search for parts here. Click the search icon to search for by Part number or description. Alternatively, the user can also enter the appropriate SOS (Source of Supply) and part number in the blank boxes and the system will fill in the pricing information if an exact match is found.

If there is a core charge associated with a particular part, that core charge will be pulled in and created as a separate parts line item.

If more lines for parts are needed, click the **Add +** icon.

Note:

- Parts pricing is specific to a customer based on discount and uplift parameters that are defined in DBS.
- Part prices can be refreshed only when the status of the quote is open. The user can change the status back to open at any time.
- A user can override a parts price and manually input the price. However, if the Parts Refresh is selected, the entered price will be overridden with the correct price in DBS.

To import a SIS Parts List:

1. From SIS, save a file as an .xml on the user's computer.
2. In the **Edit Parts** modal, click the **[SIS]** button.

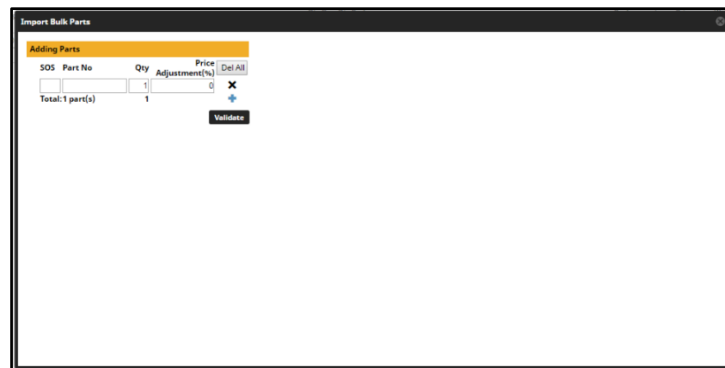
3. In the **Import SIS Parts** modal that appears, click the **[Select SIS File]** button and browse for the desired file.
4. Click the **[Upload]** button.

You can also upload a SIS parts list directly from the SIS site by clicking the **[SISSite]** button.



To bulk-add a parts list:

1. In the **Edit Parts** modal, click the **[Bulk]** button.
2. Enter the SOS, full or partial part numbers, and quantity.
3. Click the **[Validate]** button. If there is more than one part number that matches, the application will display the options.
4. Select the part you would like to add.
5. Click the **Add +** sign to add more parts.
6. Once all the parts have been validated, click the **[Import]** button.



To import a DBS parts document:

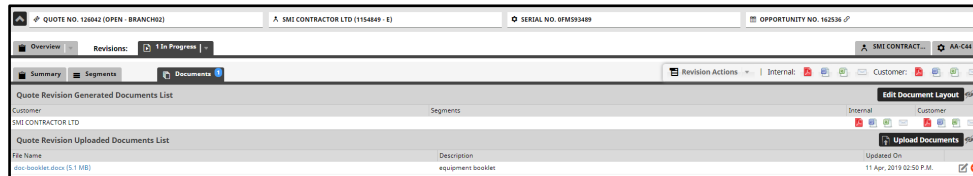
1. In the **Edit Parts** modal, click the **[DBS]** button.
2. Enter a DBS Part Document number into the search box that appears in the **Import DBS Parts** modal.
3. Check the boxes of the appropriate documents.
4. Click the **[OK]** button.

Doc No	Store	Cust No	Cust Name	Cust PO No	Cust Equip No	Sales Rep
145222153A	14	1535584	DF EXCAVATING & UNDERGROUND		823-02	Jonathan Ferrante
145222153	14	1535584	DF EXCAVATING & UNDERGROUND		823-02	Jonathan Ferrante
14C347153A	14	4992806	UTN CONSTRUCTION INC	7041		COMMERCE ORDER
14C347153	14	4992806	UTN CONSTRUCTION INC	7041		COMMERCE ORDER
07C415393	7	1105395	PWP CONTRACTOR LTD	5017-0909		CARL J DONATO
07C415388A	7	1048050	XFB CONTRACTOR LTD		289	CHRIS A KONDORACH
07C415388	7	1048050	XFB CONTRACTOR LTD		289	CHRIS A KONDORACH
07C415382C	7	1329275	BUT WELL DRILLING INC		17-03262	FRANK CLANCY
07C415382B	7	1329275	BUT WELL DRILLING INC		17-03262	FRANK CLANCY
07C415382A	7	1329275	BUT WELL DRILLING INC		17-03262	FRANK CLANCY
07C415382	7	1329275	BUT WELL DRILLING INC		17-03262	FRANK CLANCY
07C415370B	7	1261550	RFP WELL DRILLING INC	D400		HARRY A BOEHM
07C415370A	7	1261550	RFP WELL DRILLING INC	D400		HARRY A BOEHM
07C415370	7	1261550	RFP WELL DRILLING INC	D400		HARRY A BOEHM
07C415368D	7	1649800	DKE EXCAVATING & UNDERGROUND	349755		COMMERCE ORDER
07C415368C	7	1649800	DKE EXCAVATING & UNDERGROUND	349755		COMMERCE ORDER
07C415368B	7	1649800	DKE EXCAVATING & UNDERGROUND	349755		COMMERCE ORDER
07C415368A	7	1649800	DKE EXCAVATING & UNDERGROUND	349755		COMMERCE ORDER

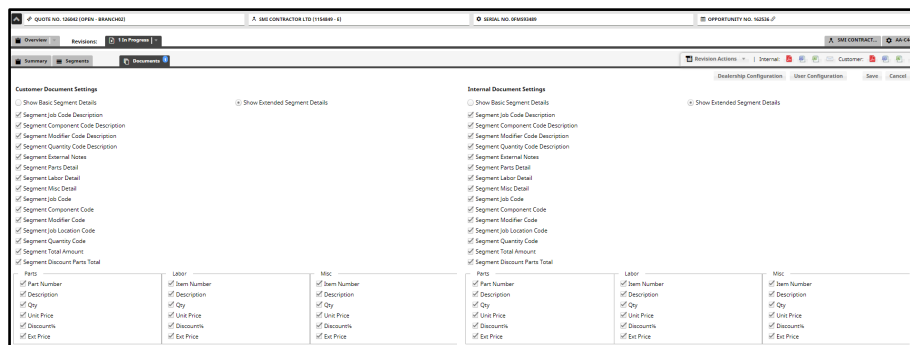
Documents Tab

This tab displays two types of Quote Revision documents:

- Quote Revision Generated Documents
- Quote Revision Uploaded Documents



Configure the layout of the Generated Documents by clicking the **[Edit Document Layout]** button. This allows you to customize which information is displayed in the Generated Documents list. By default, all the items are selected or the items configured by a dealership. The items are shown of the quote will be visible and it can be different for the customer and internal users.



The quote document that is generated is configured for an individual dealer with the appropriate logo, terms and conditions, and any additional information that has been provided. It is available in Word or PDF format and both documents can be emailed.

The Generated Documents can be exported in both their internal and external versions:

- Internal: shows the shop versions of these documents.
- Customer: displays the quote as it would be delivered to the customer. You can select whether segment detail (individual parts) is to be displayed on the quote.



There are three different versions of these documents that can be exported:

- **Email:** Please note that an email recipient must be entered in the email field.
- **Word Document**
- **PDF**