

UPTAKE™

Industrial CRM *SalesLink Flex*

USER GUIDE

Updated January 26, 2021



DISCLAIMER

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 This user guide will be updated on an ongoing basis and may have slightly outdated content due to the frequency of software updates.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

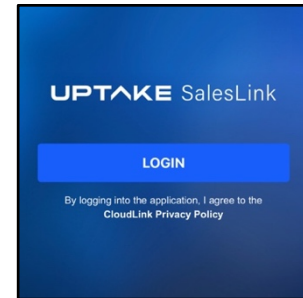
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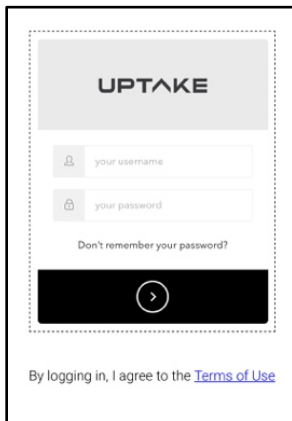
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Introduction

Welcome to SalesLink Flex. This user-friendly mobile app allows you to perform key functions from the SalesLink browser application using your iOS or Android device. As a Dealer Sales Manager, you can quickly access, interact and update all the information you need regarding customers and deals, literally in the palm of your hands.



Logging In



To log in to SalesLink Flex:

1. Download the SalesLink Flex app from the App Store.
2. Tap the **[LOGIN]** button.
3. Enter your **Tenant** name, then tap **[NEXT]**. If you're unsure of your Tenant name, tap the Question (?) icon for further information.
4. Enter your **Username** and **Password**.
5. Tap the black arrow (>) at the bottom of the screen to log in.

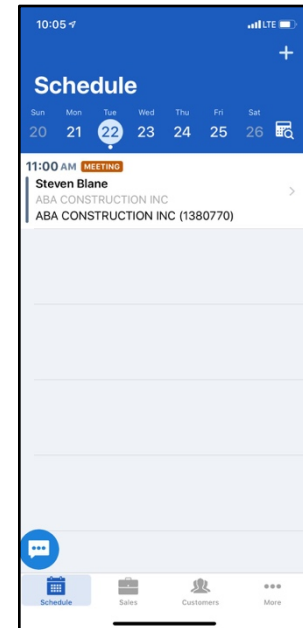
Schedule

After successfully logging in you are automatically taken to the **Schedule** tab, which displays a breakdown of all your scheduled activities for the day. Each activity in the list displays basic details:

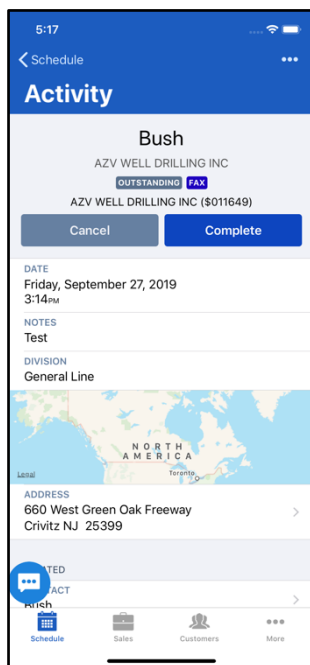
- Time activity is scheduled to occur
- Type of activity (Telephone call, Email, Lunch Meeting, etc.)
- Name of company and/or contact person
- Company ID number

Tap on another day of the week at the top of the screen to view the scheduled activities for that day, or tap the Calendar icon to the right to view a different week/month.

Tap on an activity to view its **Activity** page.



Activity



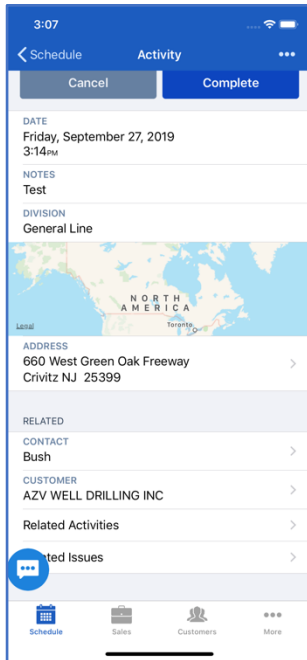
The **Activity** page displays more in-depth information about a specific activity:

- Customer Name
- Customer ID Number
- Contact Person
- Status
- Date and Time of Activity
- Division
- Address
- Quick access to contact details including division, activities, all contacts, leads/opportunities, issues, equipment units, attachments, and rentals.
- Notes

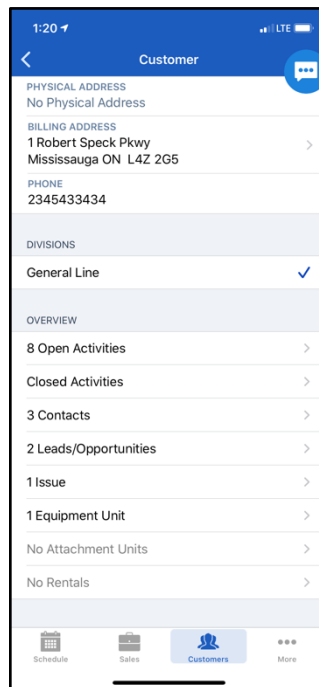
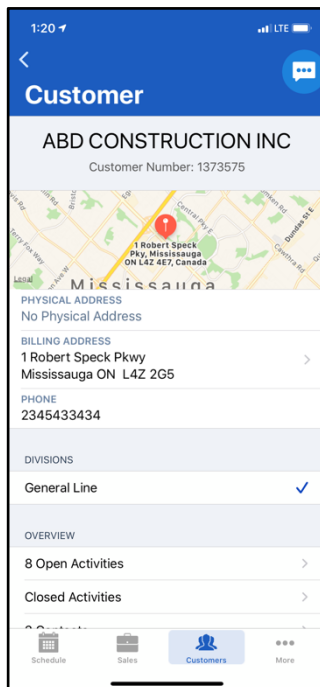
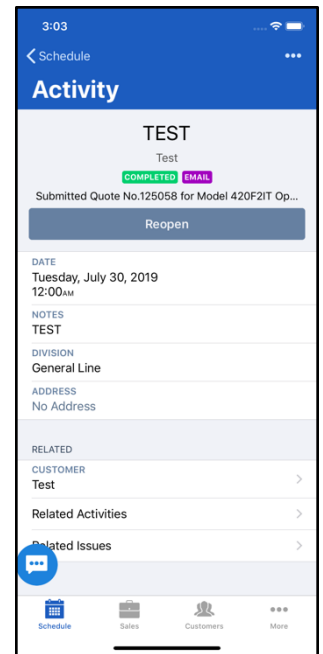
Tap the three dots at the top right of the screen to **Edit** or **Delete** the activity.

Tap on the contact person's name to view their **Contact Details** page.

Scroll down to view a map of the activity address. Tap on the map to open the location in your preferred mapping application if you need directions or more information.



Either tap the **[Complete]** button once the activity has been completed or tap the **[Cancel Activity]** button if you'd like to cancel the activity. You also have the option to **[Reopen]** the activity, if desired.



Tap **Customer Details** to view the **Customer Details** page.

Tap **Related Activities** to view any other activities with this **Contact** and/or **Customer**.

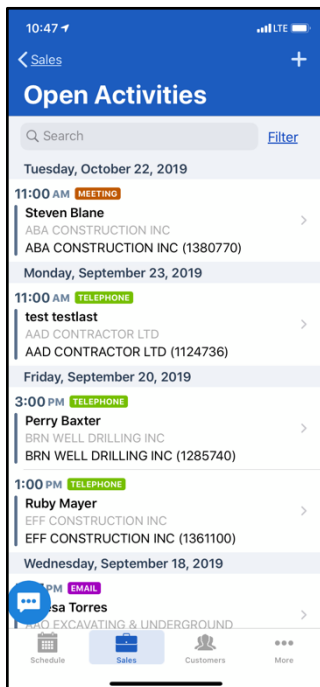
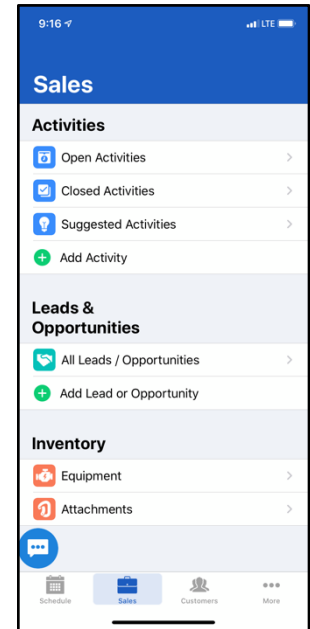
Tap **Related Issues** to view any open **Issues** with this **Customer**. For more information, see the **Issues** section.

Sales

Tap the **Sales** tab at the bottom of the screen. This tab gives you the necessary tools and information needed to successfully make a sale.

Sales is divided into three sections:

- Activities
- Lead & Opportunities
- Inventory



Activities

Open Activities

Tap **Open Activities** to display a list of your currently open activities, organized by date. Scroll through the list and tap on an activity to view its **Activity Details** page.

You can also search for a specific activity using the Search bar at the top of the screen or tap the **[Filter]** button to narrow down your list.

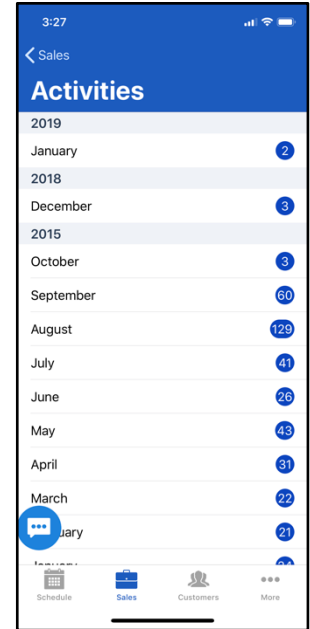
1. Select Type, Customer, and Sort Order.
2. Choose from the Quick Dates options or enter a Custom Range of dates to filter by.
3. Tap the **[APPLY FILTERS]** button to filter the list.

You can add a new activity by tapping the Plus (+) icon at the top right of the screen. For more information, see the **Add Activity** section.

Closed Activities

Tap **Closed Activities** to display a record of all of your closed activities, aggregated by month and year. Each time you **Complete** an activity, it is automatically added to this list.

Tap on a month to view a list of all activities that were closed during that particular month. From here you can also tap on a specific activity to view its **Activity Details** page.



Suggested Activities

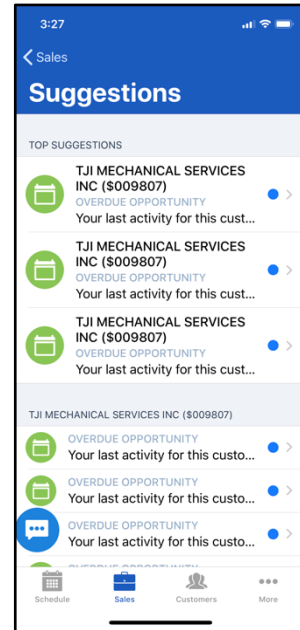
Tap **Suggested Activities** to view a list of these suggestions. Your top suggestions for the day are displayed first.

Our Machine Learning platform generates high valued activities based on a number of criteria. These include:

- A list of the top 3 suggestions that you could be filling your time with to optimize performance.
- Activities on a customer by customer basis, that help you optimize productivity.

Each new and unread/unopened activity is listed with a blue dot.

Tap on a suggestion to view its details. You have the option of taking further action on the suggestion or ignoring it. Once reviewed, the blue dot clears to help you further optimize your time.



Add Activity

Tap the **[Add Activity]** button to add a new activity. Complete all required fields:

- Customer
- Division
- Contact (Optional)

ACTIVITY DETAILS

- Subject
- Status (Required)
- Date
- Type (Required)
- Purpose (Optional)
- Notes (Required)

Tap the **[Submit]** button at the bottom to add the activity.

Lead & Opportunities

All Leads / Opportunities

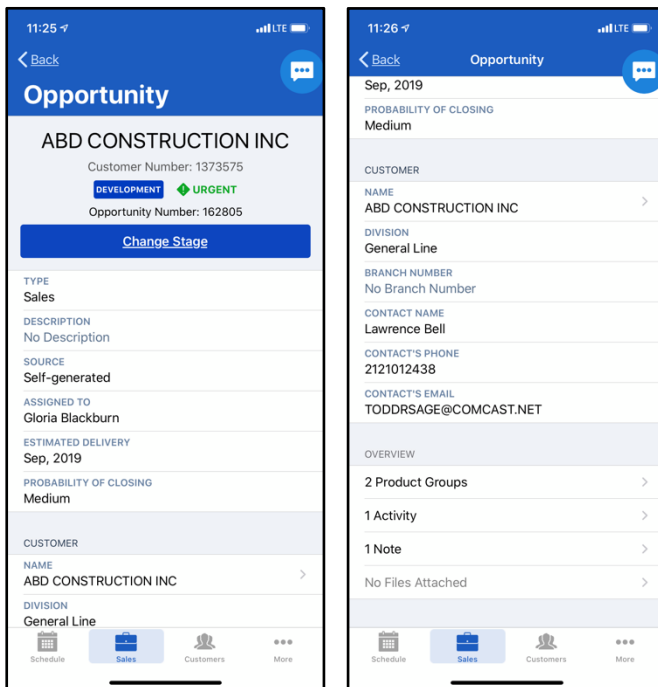
Tap **All Leads / Opportunities** to view a list of all of your current leads and potential opportunities. Scroll through the list and tap on a lead or opportunity to view its **Lead Details** or **Opportunity Details** page.

You can also search for a specific lead or opportunity using the Search bar at the top of the screen or tap the **[Filter]** button to narrow down your list.

1. Select the **Type** of lead or opportunity you want to filter by.
2. Tap the **[Filter]** button to filter the list.

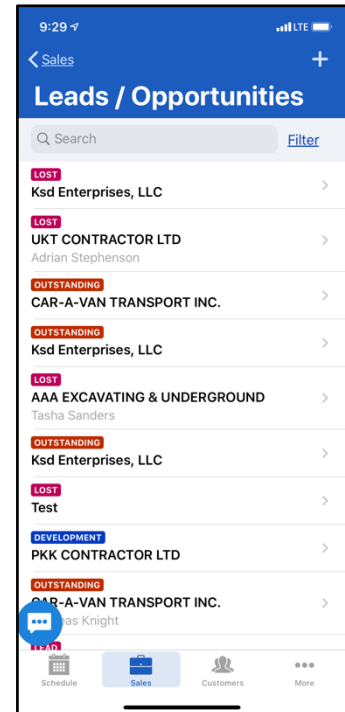
You can add a new lead or opportunity by tapping the Plus (+) icon at the top right of the screen. For more information, see the **Add Lead / Opportunity** section.

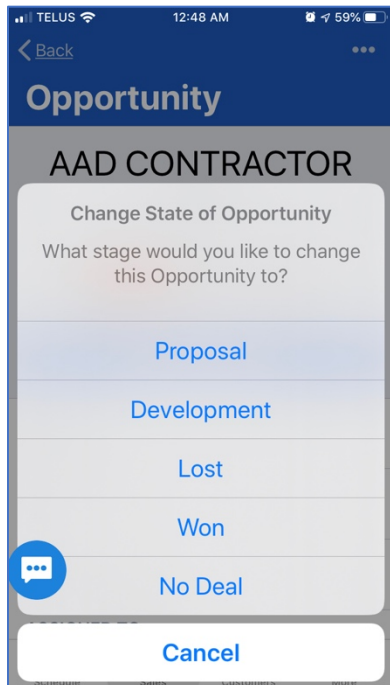
Lead / Opportunity Details



Tap on a lead or opportunity to view its **Lead Details** or **Opportunity Details** page. Tap the three dots at the top right of the screen to **Edit** the lead or opportunity.

- For leads, you have the option to tap the **[Promote]** button to promote the lead, or the **[Set as No Lead]** button to disregard it.



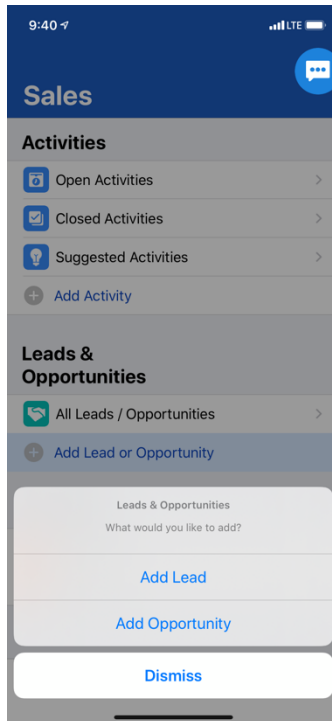


For opportunities, you have the option to tap the **[Change Stage]** button to change its stage to **Proposal**, **Development**, **Lost**, **Won**, or **No Deal**.



The overview section allows you to view Product Groups, housing everything you'll be proposing to sell in this deal. Additionally, you can view Activities, Notes and any Attached Files.

Add Lead or Opportunity



Tap the **[Add Lead or Opportunity]** button, then select either **Add Lead** or **Add Opportunity**.

 A screenshot of the 'Add Lead' form. At the top, the status bar shows TELUS, 12:52 AM, and 58% battery. The form has a blue header with 'Cancel' and a toggle for 'Urgent'. Below the header, there are several fields: 'Customer' (No selection, Required), 'Division' (No selection, locked), 'Contact' (No selection, locked), 'Name' (locked), 'Email' (locked), 'Phone' (locked), and 'DESCRIPTION' (Description, Required). A blue circular icon with three white dots is visible on the left side of the form.

Add Lead

Complete all required fields:

- Tap the Urgent toggle if the opportunity is urgent (Optional)
- Customer
- Division
- Contact (Optional)
- Name
- Email (Optional)
- Phone (Optional)
- Description

- Type
- Stage (Optional)
- Source
- Assign To (Optional)
- Branch (Optional)

Tap the **[Submit]** button to save the lead.

9:43

Cancel

DESCRIPTION

Description Required

Type Required
No selection >

Stage Optional
Lead >

Source Required
No selection >

Assign To Optional
Me >

Branch Optional
No selection >

Submit

Cancel

TELUS 12:59 AM 57%

Cancel

Urgent

Customer Required
No selection >

Division Locked
No selection ➔

Contact Locked
No selection ➔

Name Locked

Email Locked

Phone Locked

DESCRIPTION Required

Description

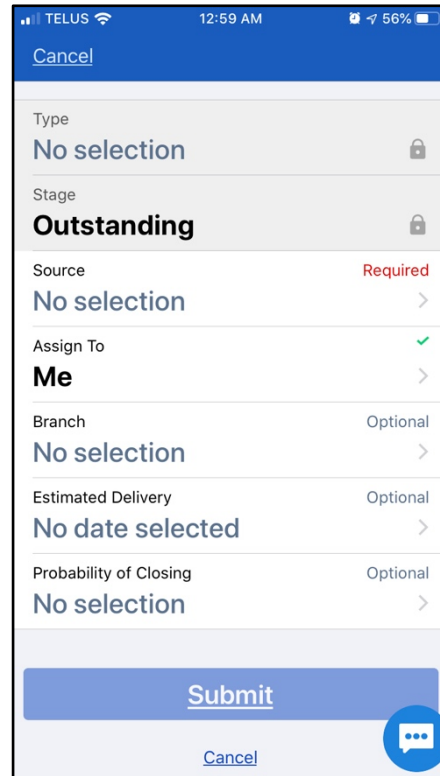
Add Opportunity

Complete all required fields:

- Tap the Urgent toggle if the opportunity is urgent (Optional)
- Customer
- Division
- Contact (Optional)
- Name
- Email (Optional)
- Phone (Optional)

- Description
- Type
- Stage (Optional)
- Source
- Assign To (Optional)
- Branch (Optional)
- Estimated Delivery (Optional)
- Probability of Closing (Optional)

Tap the **[Submit]** button to save the opportunity.



The screenshot shows a mobile application interface for creating an opportunity. At the top, there is a status bar with 'TELUS', signal strength, Wi-Fi, time '12:59 AM', and battery '56%'. Below the status bar is a blue header with a 'Cancel' link. The form consists of several rows, each with a label on the left and a value on the right. 'Type' is 'No selection' with a lock icon. 'Stage' is 'Outstanding' with a lock icon. 'Source' is 'No selection' with a red 'Required' label and a chevron. 'Assign To' is 'Me' with a green checkmark and a chevron. 'Branch' is 'No selection' with 'Optional' label and a chevron. 'Estimated Delivery' is 'No date selected' with 'Optional' label and a chevron. 'Probability of Closing' is 'No selection' with 'Optional' label and a chevron. At the bottom, there is a large blue 'Submit' button and a smaller blue 'Cancel' button. A blue circular chat icon is in the bottom right corner.

Type	No selection	🔒
Stage	Outstanding	🔒
Source	No selection	Required >
Assign To	Me	✔ >
Branch	No selection	Optional >
Estimated Delivery	No date selected	Optional >
Probability of Closing	No selection	Optional >

Inventory

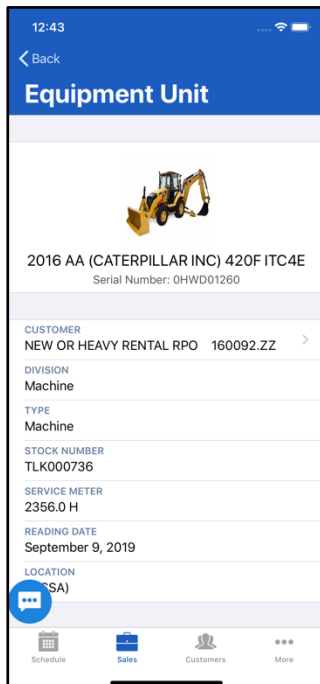
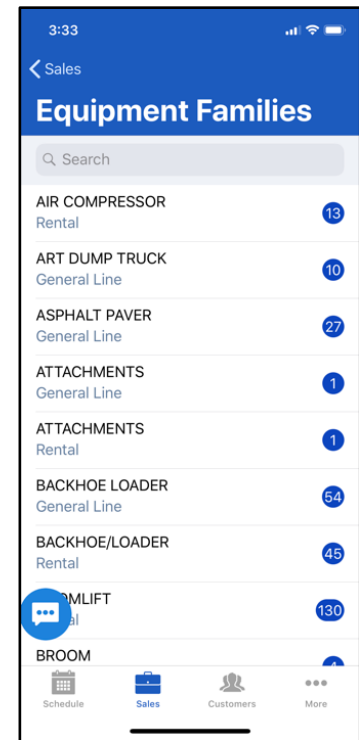
Equipment

Tap **Equipment** to view a list of all **Equipment Families** in your Inventory. Scroll through the list to find an **Equipment Family** or use the Search bar at the top of the screen.

Tap on an **Equipment Family** to view a list of **Equipment Models**. Scroll through the list to find an **Equipment Model** or use the Search Bar at the top of the screen.

Tap on an **Equipment Model** to view a list of **Equipment Units**. Scroll through the list and tap on an **Equipment Unit** to view detailed information about that unit. You can also tap the **[Filter]** button to filter the **Equipment Units** list:

1. Select the Status, Availability, Reservation, or Location of the **Equipment Unit** you're searching for.
2. Tap the **[Save]** button to filter the list.

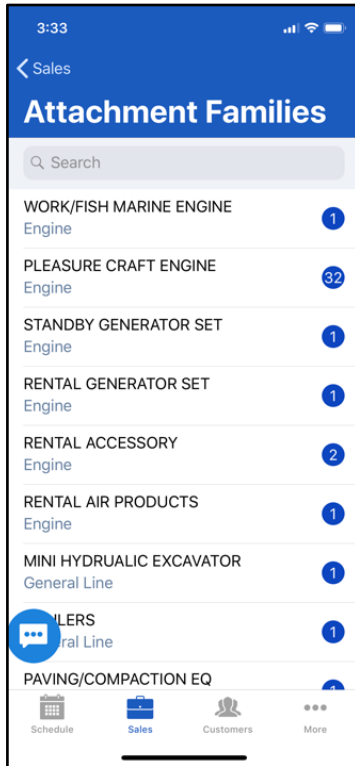


Equipment Unit

Once you navigate to the specific **Equipment Model**, you can do a deeper dive into an individual unit. Each piece of equipment has its own status page, listing the following:

- Photo
- Model/Year
- Serial Number
- Customer
- Division
- Type
- Stock Number
- Service Meter
- Reading Date
- Location
- Overview (Configurations, Photos, Warranties, Service Letters)

Attachments



Tap **Attachments** to view a list of all **Attachment Families** in your Inventory. Scroll through the list to find an **Attachment Family** or use the Search bar at the top of the screen.

Tap on an **Attachment Family** to view a list of **Attachment Models**. Scroll through the list to find an **Attachment Model** or use the Search bar at the top of the screen.

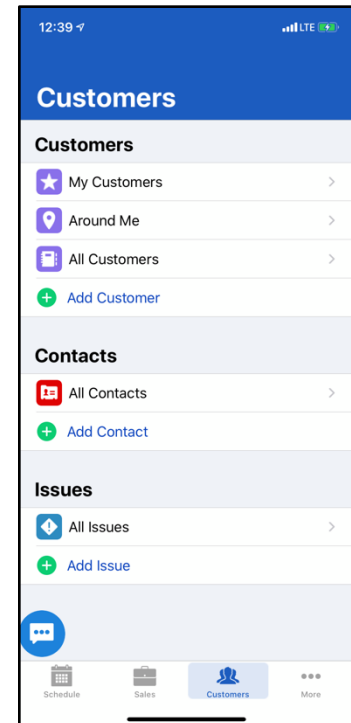
Tap on an **Attachment Model** to view a list of **Attachment Units**. Scroll through the list and tap on an **Attachment Unit** to view detailed information about that unit. You can also tap the **[Filter]** button to filter the **Attachment Units** list:

1. Select the Status, Availability, Reservation, or Location of the **Attachment Unit** you're searching for.
2. Tap the **[Save]** button to filter the list.

Customers

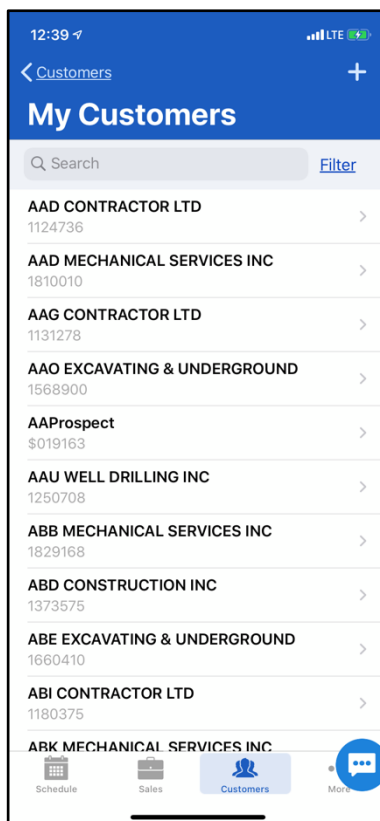
Tap the **Customers** tab at the bottom of the screen. This tab provides you with the necessary tools to maintain your relationship with your customers. **Customers** is divided into three sections:

- Customers
- Contacts
- Issues



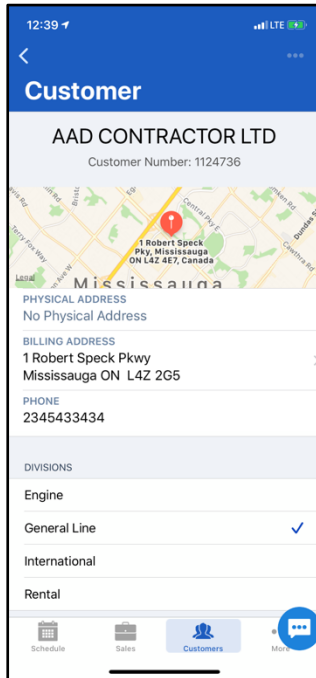
Customers

My Customers



Tap **My Customers** to view an alphabetical list of all of your customers. Scroll through the list to find a specific customer, or search for them using the Search bar at the top of the screen.

You can also tap the Plus (+) icon at the top right of the **Customers** list to add a new customer. For more information, see the **Add Customer** section.



Tap on a customer to display their **Customer Details** page, which provides you with detailed information about the customer:

- Name
- Customer Number
- Address/Phone
- Location Map
- Divisions
- Overview (Related Activities, Contacts, Leads/Opportunities, etc.)

Add Customer

On the customer list page, tap the **[Add Customer]** button to add a new customer.

Complete all required fields:

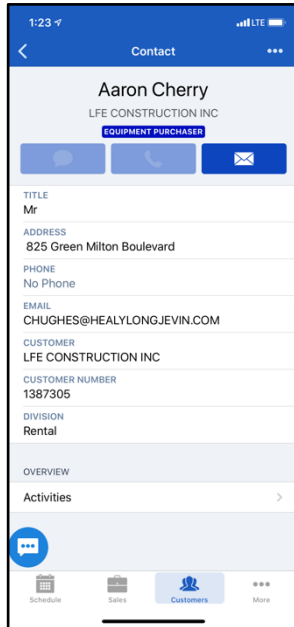
- Type
- Name
- Tax Number (Optional)
- Division
- Phone
- Fax (Optional)
- Branch (Optional)
- Address 1
- Address 2 (Optional)
- Address 3 (Optional)
- City
- Postal/Zip Code (Optional)
- Country
- State/Province (Optional)
- County
- Physical Location

Tap the **[Save]** button to save the customer.

Contacts

All Contacts

Tap **All Contacts** to view an alphabetical list of all of your contacts. Scroll through the list to find a specific contact, or search for them using the Search bar at the top of the screen.



Tap on a contact to display their **Contact Details** page, which provides you with detailed information about the contact:

- Name
- Company
- Address
- Customer
- Customer Number
- Type
- Division

Tapping one of the buttons under the contact name allows you to **Message**, **Call**, or **Email** the contact.

Tap the three dots at the top right of the screen to **Edit** or **Delete** the contact.

You can also tap the Plus (+) icon at the top right of the **Contacts** list to add a new customer. For more information, see the **Add Contact** section.

Add Contact

Tap the **[Add Contact]** button to add a new contact.

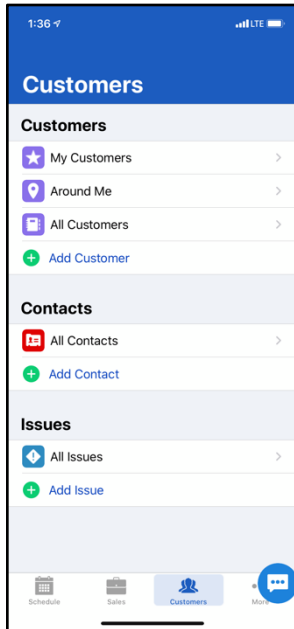
Complete all required fields:

- Type (Prospect/Customer)
- Name
- Tax Number
- Division
- Phone
- Fax (Optional)
- Address
- Physical Location

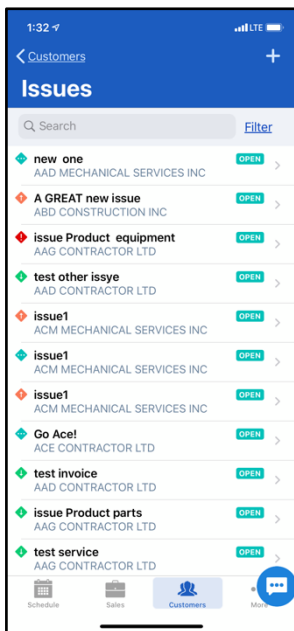
Tap **[Submit]** to save.

Issues

All Issues



Tap **All Issues** to display a list of all Open and Resolved issues. Scroll through the list and tap on an issue to view its **Issue Details** page.



You can also search for a specific issue using the Search bar at the top of the screen or tap the **[Filter]** button to narrow down your list.

1. Select a Type, Status, Start Date, and To Date you want to filter by.
2. Tap the **[Submit]** button to filter the list.

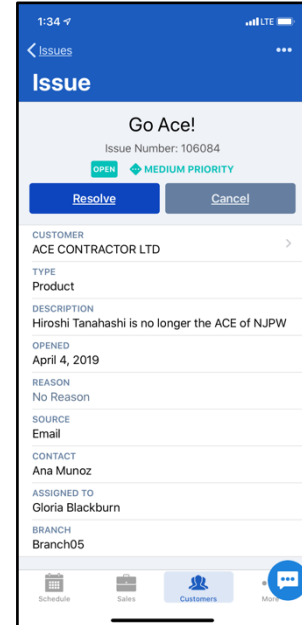
You can add a new issue by tapping the Plus (+) icon at the top right of the screen. For more information, see the **Add Issue** section.

Issue Details

Tap on an issue to view its **Issue Details** page. The Company Name, Company ID, and Open or Resolved status is displayed at the top. Tap the **[Resolve]** button if the issue has been resolved, or **[Cancel]** to delete the issue.

Other details:

- Status
- Subject
- Type
- Opened
- Priority
- Source
- Reason
- Description
- Invoice No.
- Invoice Amount
- Work Order No.
- Dispute Amount



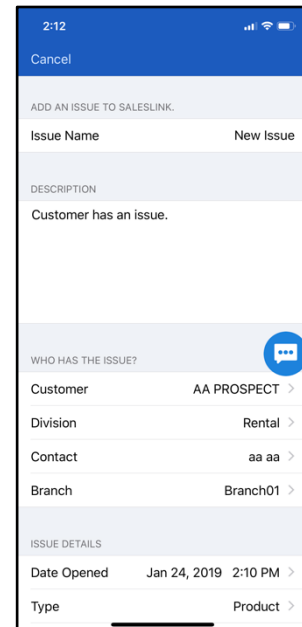
Add Issue

Tap the **[Add Issue]** button to add a new issue.

Complete all required fields:

- Issue Name
- Description (Optional)
- Customer
- Division
- Contact
- Branch
- Date Opened
- Type (Optional)
- Reason (Optional)
- Priority
- Status
- Source

Tap the **[Submit]** button to save the issue.



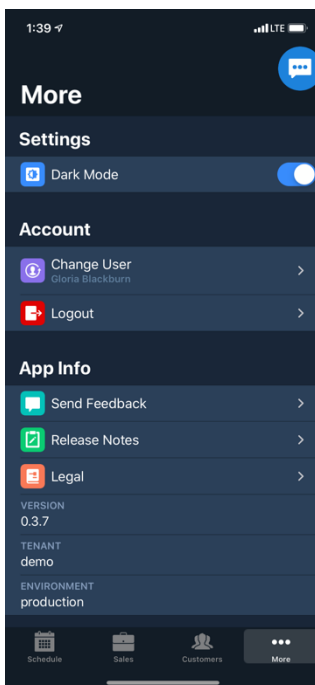
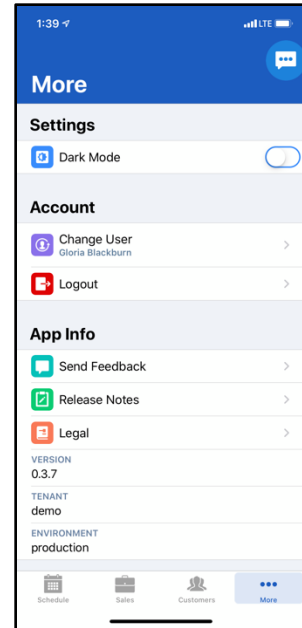
More

Tap the **More** tab at the bottom of the screen. This tab provides you with several miscellaneous tools regarding your personal Settings and Account.

Send Feedback

Tap **Send Feedback** to provide feedback about the SalesLink Flex app. This will open up the same window as the floating blue chat icon, giving you the option to:

- Report a problem with the app
- Suggest an improvement



Dark Mode

Tap the **[Dark Mode]** button to switch to dark-colored version of SalesLink Flex. This can be useful when you're in a dimly lit environment. Tap the button again to switch back to the standard colors.

Note that only the color scheme—and nothing else—changes when the app is in **Dark Mode**.

Legal

Tap **Legal** to review the CloudLink Privacy Notice document.

Logout

Tap **Logout** to log out of SalesLink Flex. A popup will appear to confirm you're sure you want to log out. Tap the **[Yes]** button to log out, or **[No]** to remain logged in.

Environment

Depending on your user role and permissions, you may have access to different SalesLink Flex environments. The **Environment** section displays the environment you are currently accessing.