Industrial CRM

*SalesLink**

USER GUIDE

Updated June 12, 2019

UPTAKE

includes *Customer Issue Management* and *Commission Framework

Table of Contents

Disclaimer ..... Error! Bookmark not defined.
Trademarks ..... Error! Bookmark not defined.
Introduction **8**
Customization 8
SalesLink – Sales Reps **9**
Home 9
Navigation Bar 9
ON THE GO 10
CUSTOMERS 10
PIPELINE 10
SEARCH 11
PROFILE 11
SETTINGS 11
QUICK LINKS 11
Activities 12
Add an Activity 12
Overdue Activities 13
Not Contacted 14
Customer Suggestions 15
Activity History 15
Activities by Purpose 16
Last Customer Activities 17
Customer Coverage 18
Leads and Opportunities 19
Key Indicator Dashboard 19
Add New Lead 20
Transfer Lead to Opportunity 22
Transfer Lead to No Lead 22
Add New Opportunity 23
Opportunity Stages 24
Opportunities Reports 25

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Lead and Opportunity Performance 26
My Resolved Leads 27
Territory 28
Add New Customer 28
Add New Prospect 28
Customer List 28
Customers Segmentation 30
Customers by Counties 32
Territory Changes 33
Account Plans 33
Unassigned Accounts 34
Accounts Receivable 35
Advanced Search 36
Pending Requests 37
Request History 37
Issues 38
Add New Issue 38
My Customer's Issues 38
Issues Assigned to Me 39
Issues Originated by Me 40
Competitors 41
Add COMPARE Report 41
My Competitive Info (All Customers) 41
All Competitive Info (All Models & Reps) 42
COMPARE Report Finder 43
Open UCC 43
Plans 45
Territory Plans 45
Add New Plan 45
Budget 46
Sales 47
Performance Profile 47
Add Lost Sales 47

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My Lost Sales (All Customers) 48
All Lost Sales (All Models and Reps) 49
Latest Work Orders 50
Commissions 51
Commissions – Paid: Summary 51
Commissions – In Process 51
Commissions – Request 51
Insights 52
Campaigns 52
Expiring Warranties 53
SalesLink – Executive 56
Navigation Bar 56
ON THE GO 56
CUSTOMERS 56
PIPELINE 57
DIVISIONS 57
SEARCH 57
PROFILE 57
SETTINGS 57
QUICK LINKS 58
Customer Profiles 58
Key Indicator Dashboard 61
Activities 64
Add New Activity 64
My Calendar 65
Overdue Activities 66
Made Activities 67
Activity Percentage 68
Activity Distribution 69
PAR Percentage 69
Customer Coverage 70
Activities by Purpose 71
My Activity History 72

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Leads and Opportunities 73
Add New Lead 73
Transfer Lead to Opportunity 74
Transfer Lead to No Lead 74
Add New Opportunity 75
Opportunity Stages 75
Outstanding Leads 76
Resolved Leads 77
Opportunities Reports 78
Opportunities by Create Date 79
Lead and Opportunity Performance 80
Product Support Opportunity Summary 81
Territory 82
Add New Customer 82
Add New Prospect 82
Accounts Receivable 82
A/R Notes List 83
My Requests 83
Outstanding Requests 84
Sales Team 85
Request History 86
Change Requests 86
Prospect Sources 87
Customers by Counties 87
Unassigned Accounts 88
Advanced Search 89
Issues 90
Add New Issue 90
My Customer's Issues 90
Issues Assigned to Me 91
Issues Originated by Me 92
Plans 93
Territory Plans 93

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Account Plans 93
Competitors 94
Add COMPARE Report 94
Competitive Info by Region 94
Competitive Info by Model (New Deliveries) 95
Competitive Info by Model (All) 96
COMPARE Report Finder 97
COMPARE Report by Sales Rep 97
Insights 98
Add New Campaign 98
Campaigns 98
OLGA Alerts – By Region 100
OLGA Alerts/Leads – By Assigned PSSR 100
OLGA Summary 101
Expiring Warranties 102
Sales 105
Sales Performance Summary 105
Equipment Sales Budget 106
Parts and Service Performance Summary 107
Parts & Service Sales Budget 108
Lost Sales by Region 108
Lost Sales by Model (All) 109
Lost Sales From UCC 110
Add Lost Sales 110
Latest Work Orders 111
CAT CSS 112
Commissions 113
Commissions – In Process 113
Commissions – Paid 113
Admin – Commissions Period 114
Admin – Reps – Commission Plans 115
Admin – User Access 116
Gatekeeper 117

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Navigation Bar 117
REQUESTS 117
SEARCH 117
Advanced Search 118
SETTINGS 118
Home 119
Admin 120
Prospect – Flag for Deletion / Transfer 120
Customer – Flag for Deletion 121
To Do 122
Hold 122
Follow-up Required 123
Follow-up Completed 124
History 125
Done 125
Invalid 126
Done and Copy 127

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DISCLAIMER

We update SalesLink 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.

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CUSTOMIZATION

This user guide will show you how to use the SalesLink application with the assumption that your dealership has made the migration to CloudLink and your SalesLink 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 SalesLink. This user-friendly application allows you to easily perform the daily tasks of selling and renting equipment, and gives you valuable insights into sales performance and metrics across your dealership.

There are three different SalesLink modules based on user type: SalesLink Sales Reps, SalesLink Executive, and Gatekeeper. Each of these are detailed within this user guide.

NOTE: SalesLink currently only supports the Google Chrome browser.

Customization

This user guide will show you how to use the three SalesLink modules with the assumption that your dealership has made the migration to CloudLink and your SalesLink 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: This user guide is currently being updated. Please check back frequently for the most recent version.

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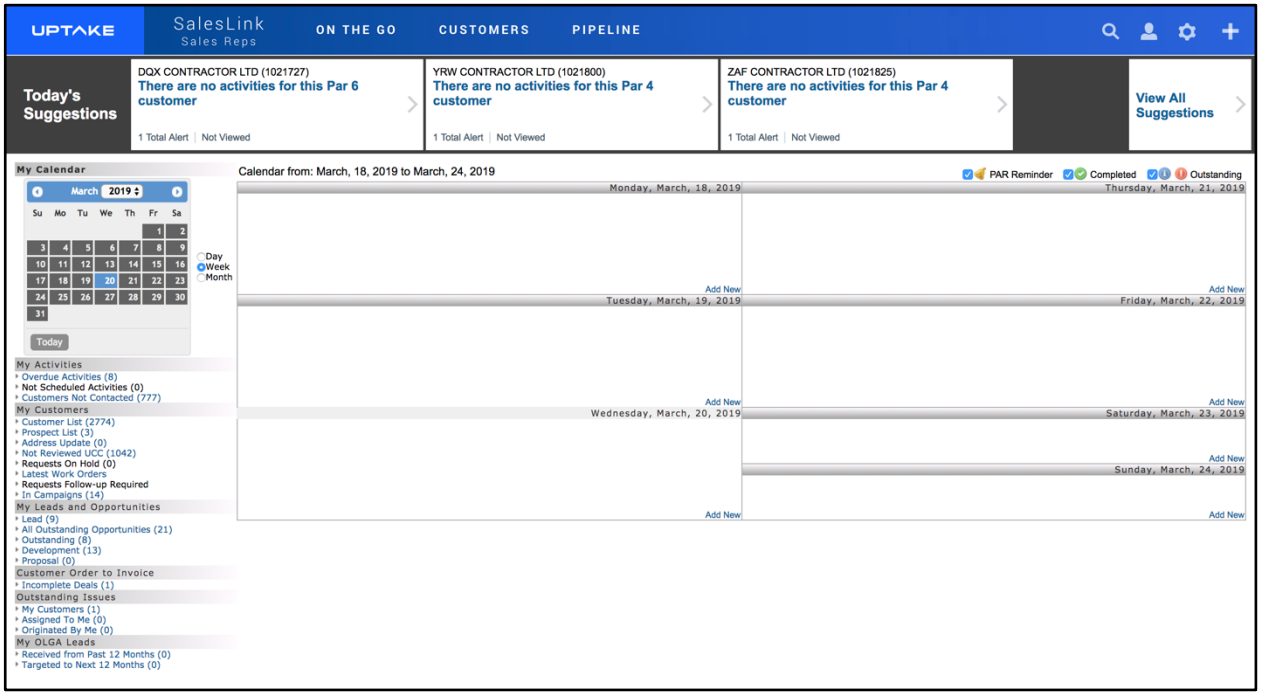
SALESLINK – SALES REPS

Log in to CloudLink with your Username and Password, then click the **[ENTER]** button under **SalesLink – Sales Reps**. You will be taken to the SalesLink Sales Reps Home page.



Home

The Home page displays a calendar of your activities for the current week. Hover your cursor over an activity to view more details. Use the smaller calendar to the left to change the week displayed.

Below the small calendar are useful links related to your Activities, Customers, Leads and Opportunities, Customer Order to Invoice, Outstanding Issues, and OLGA Leads.

Just above your weekly calendar is a banner displaying your suggested activities for the day. Click on an activity to view its details.

Navigation Bar

At the top of the screen is a navigation bar that can be accessed from anywhere in the application.

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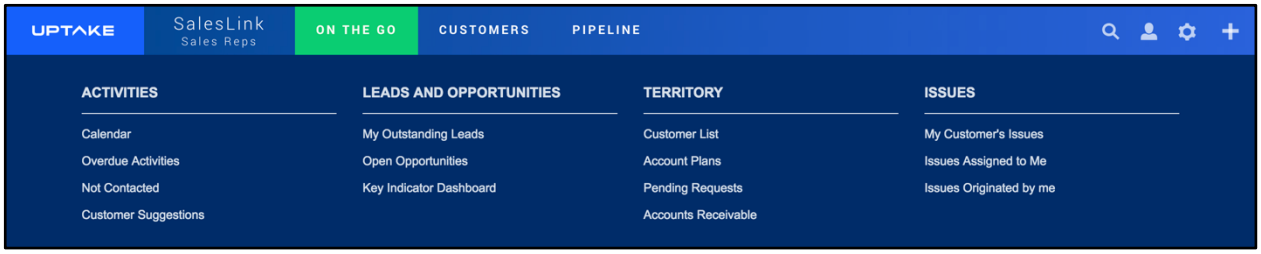
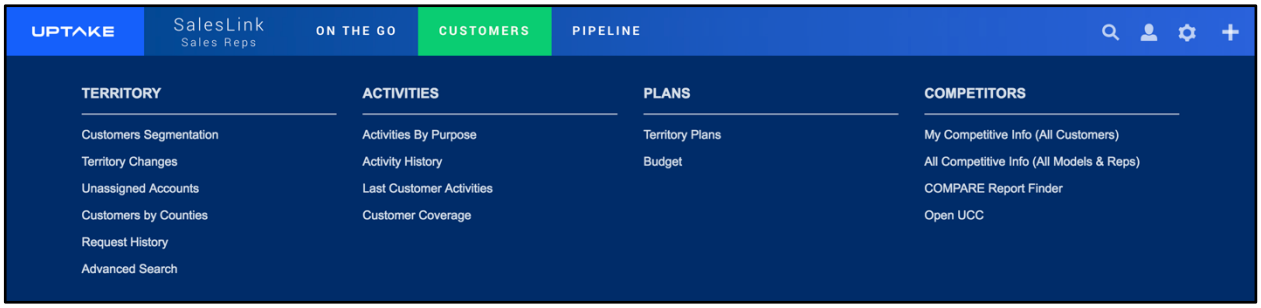
ON THE GO



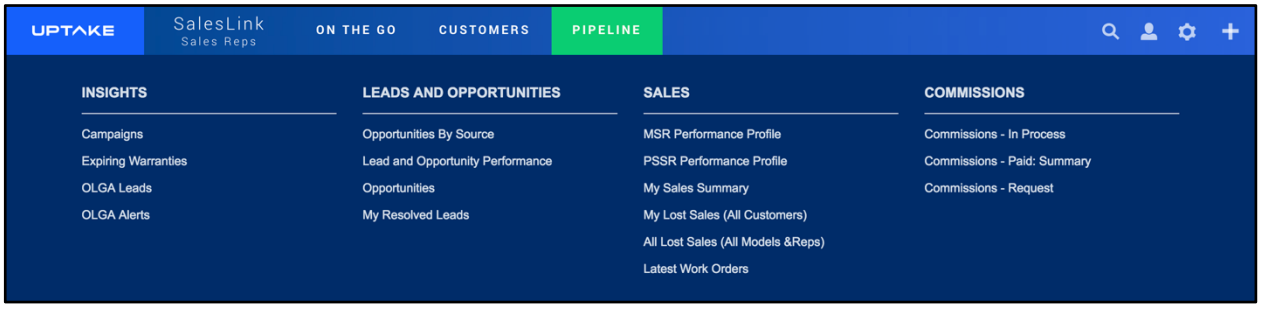
Hover over the ON THE GO tab to access pages related to your daily Activities, Leads and Opportunities, Territory, and Issues.

CUSTOMERS



Hover over the CUSTOMERS tab to access pages related to your customer Territory, Activities, Plans, and Competitors.

PIPELINE



Hover over the PIPELINE tab to access pages related to your current pipeline Insights, Leads and Opportunities, Sales, and Commissions.

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SEARCH

Click on the Search icon and use the filters to find specific information within SalesLink.

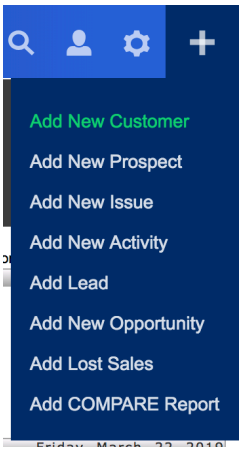
PROFILE

Click on the Profile icon to view/edit your current User Profile information.

SETTINGS

Click on the Gear icon to view/edit your current SalesLink settings.

QUICK LINKS



Click on the Plus icon at the far right to quickly perform basic SalesLink tasks from anywhere in the application.

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Activities

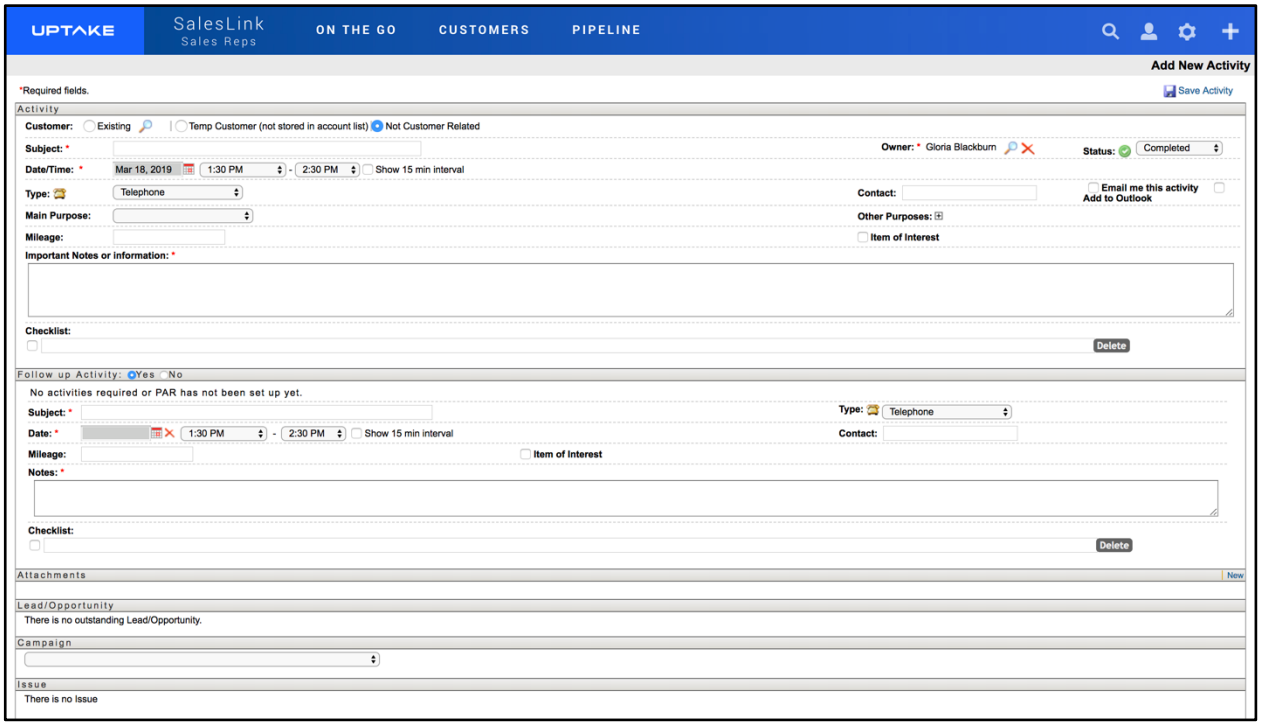
Activities are an indicator of how sales reps are engaging with customers and of how much time they're spending with them.

Daily activities are automatically displayed on the Home page after logging in, and can also be accessed by clicking the **Calendar** link under ON THE GO in the top navigation bar. For more information see the **Home** section.

Add an Activity

To add a new activity:

1. From the Home page, click the **[Add New]** button at the bottom right corner of the day you want to schedule the activity in the calendar. From the top navigation bar, click the **[Add New Activity]** button under the Plus icon.
2. Enter all required information into the Add New Activity form.
3. Click the **[Save Activity]** button at the top right or bottom right of the page.



Once saved, the activity will appear in its Owner's calendar.

Helpful Information

Status:

- Outstanding – activity is scheduled and has not occurred yet
- Completed – activity has been completed (a follow-up activity can now be scheduled)

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- Cancelled – a planned activity has been cancelled for any reason
- Overdue (visible on calendar and reports only) – if an activity has a scheduled date before the current date, the status will automatically change
- Not Scheduled (visible on calendar and reports only) – if an activity does not have a scheduled date, the status will automatically change.

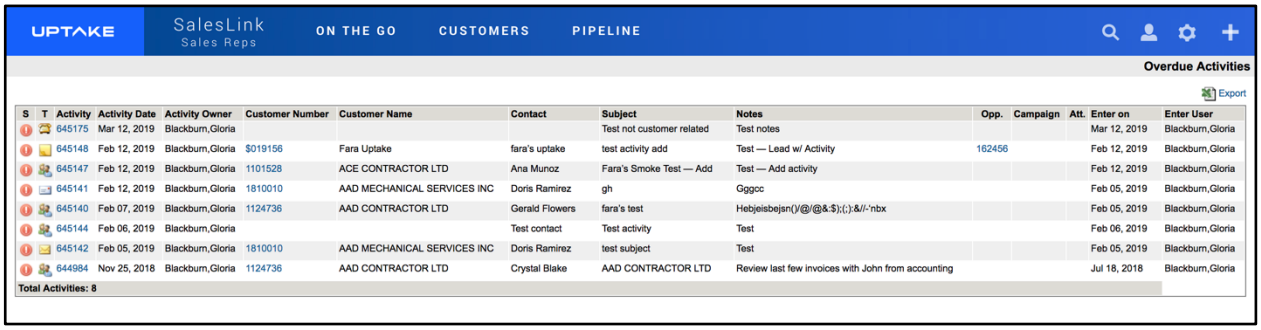
Type:

- Email – suggest: attaching the email in the activity in the attachment section
- Fax – suggest: indicating fax information in notes (i.e. subject, date, time, etc.)
- Letter – if soft copy is available, suggest attaching it in the attachment section
- Meeting – keep notes of what was discussed in the notes section and create a follow-up activity with any outstanding items
- Message – if the message was left with someone other than the contact's voicemail, suggest indicating who the message was left with
- Special Event – examples would be a trade show or open house
- Telephone – detail the information from the conversation

Follow-up Activity:
This option will only appear if the Status of the opportunity is set to Completed. If Follow-up Activity is checked Yes, the same fields as entering a new activity will appear. It will also suggest when to make the next activity based on the customer's PAR. If the activity is not customer related or if it's for a new customer, it will assume the PAR is 0.

Overdue Activities

Overdue activities are activities entered into the system with an activity date prior to the current date. Click the **Overdue Activities** link to the left of the calendar on the Home page, or under the ON THE GO tab in the top navigation bar.



S	T	Activity	Activity Date	Activity Owner	Customer Number	Customer Name	Contact	Subject	Notes	Opp.	Campaign	Att.	Enter on	Enter User
		645175	Mar 12, 2019	Blackburn,Gloria				Test not customer related	Test notes				Mar 12, 2019	Blackburn,Gloria
		645148	Feb 12, 2019	Blackburn,Gloria	$019156	Fara Uptake	fara's uptake	test activity add	Test — Lead w/ Activity	162456			Feb 12, 2019	Blackburn,Gloria
		645147	Feb 12, 2019	Blackburn,Gloria	1101528	ACE CONTRACTOR LTD	Ana Munoz	Fara's Smoke Test — Add	Test — Add activity				Feb 12, 2019	Blackburn,Gloria
		645141	Feb 12, 2019	Blackburn,Gloria	1810010	AAD MECHANICAL SERVICES INC	Doris Ramirez	gh	Gggcc				Feb 05, 2019	Blackburn,Gloria
		645140	Feb 07, 2019	Blackburn,Gloria	1124736	AAD CONTRACTOR LTD	Gerald Flowers	fara's test	Hebjeisbejsn()/@/@&.$);(;);&//-'nbx				Feb 05, 2019	Blackburn,Gloria
		645144	Feb 06, 2019	Blackburn,Gloria			Test contact	Test activity	Test				Feb 06, 2019	Blackburn,Gloria
		645142	Feb 05, 2019	Blackburn,Gloria	1810010	AAD MECHANICAL SERVICES INC	Doris Ramirez	test subject	Test				Feb 05, 2019	Blackburn,Gloria
		644984	Nov 25, 2018	Blackburn,Gloria	1124736	AAD CONTRACTOR LTD	Crystal Blake	AAD CONTRACTOR LTD	Review last few invoices with John from accounting				Jul 18, 2018	Blackburn,Gloria

Total Activities: 8

This page displays a list of all your currently overdue activities. Sort the table by clicking on a column header to sort the column in ascending or descending order.

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

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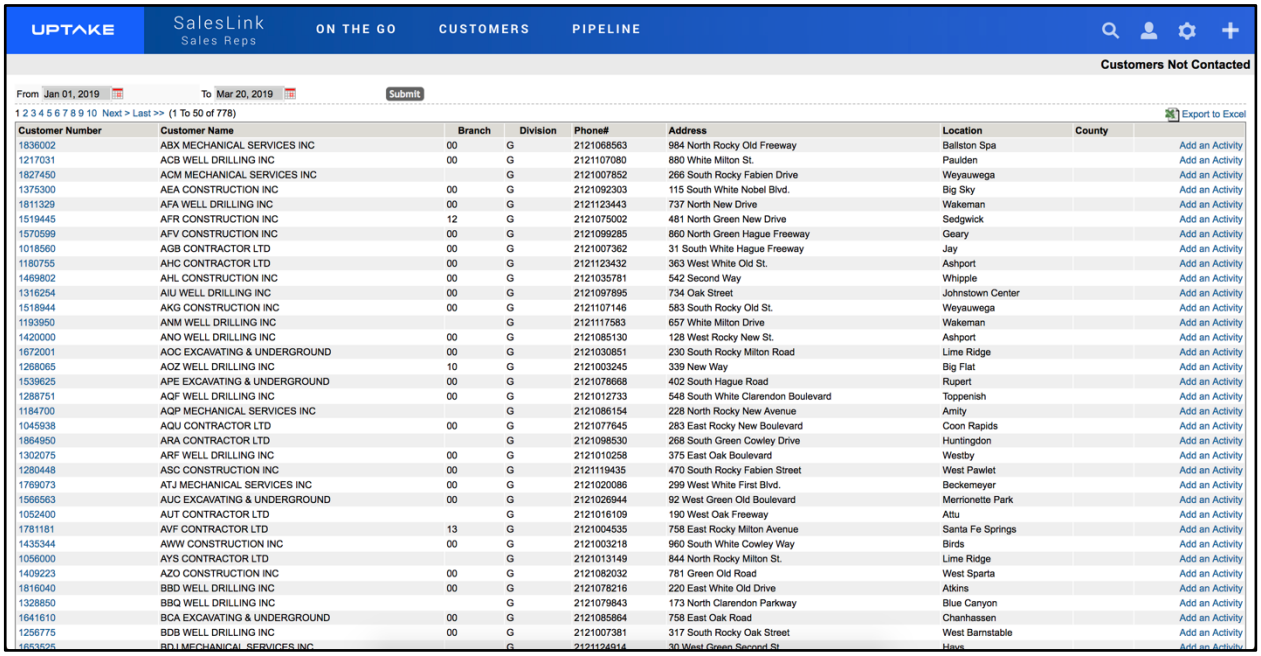
Click on the Activity Number to view the activity's details, the Customer Number to view the associated customer details, or the Opportunity Number to view the associated opportunity details (if available).

Not Contacted

Click the **Customers Not Contacted** link to the left of the calendar on the Home page, or click the **Not Contacted** link under ON THE GO in the top navigation bar. A list of all your customers that have not been contacted yet displays in a table.



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

Click the **[Add an Activity]** button to add an activity for that customer. For more information see the Add an Activity section.

To filter the table:

1. Select a date range to filter by.
2. Click the **[Submit]** button. The table will display all customers not contacted within your selected date range.

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

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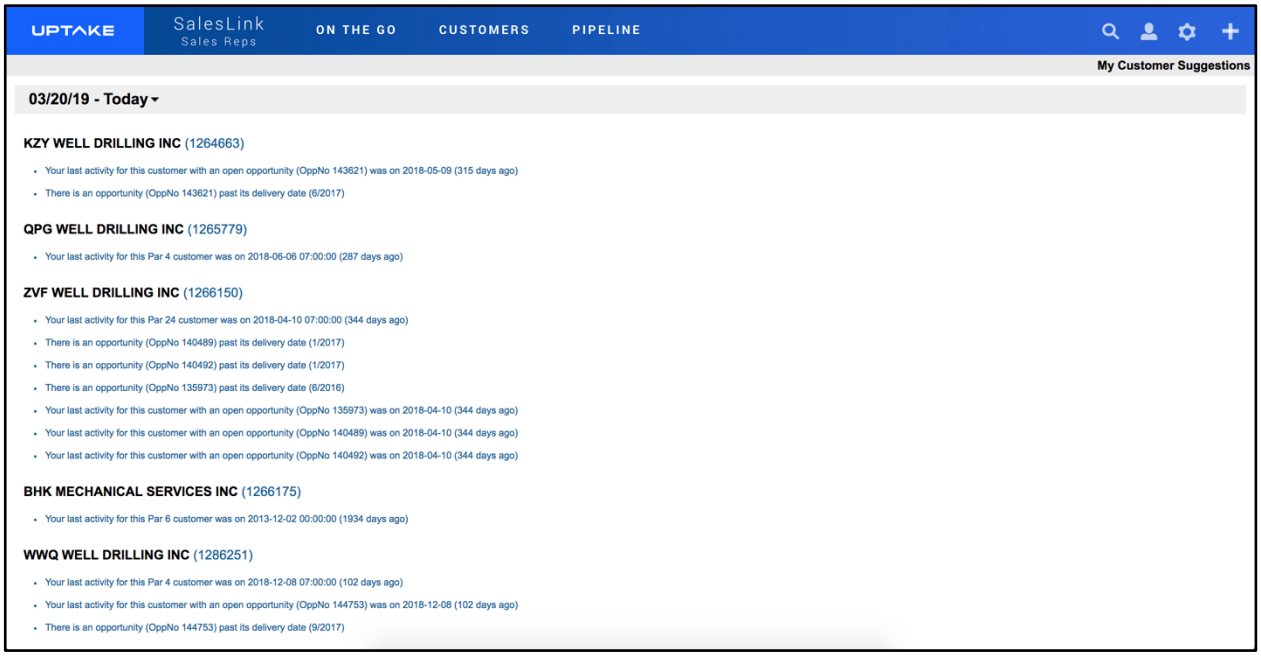
Customer Suggestions

Click the **Customer Suggestions** link under ON THE GO in the top navigation bar. A list of all your current customer suggestions that have not been viewed is displayed.



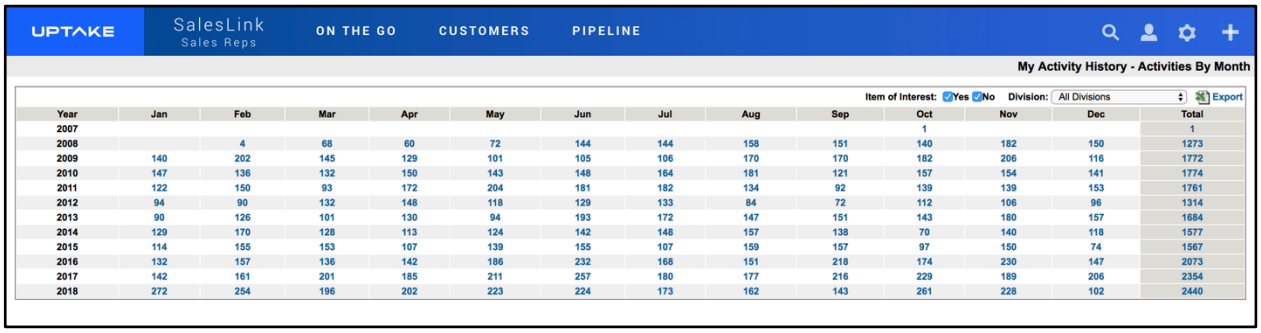
The list is organized by date and customer, with all outstanding suggestions for the current day displayed first. Click the arrow next to the current date to collapse the day's suggestions and view previous days.

Click on a customer suggestion to view the suggestion details.

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

Activity History

Click the **Activity History** link under CUSTOMERS in the top navigation bar. A complete list of all activities you've logged displays.



Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2007										1			1
2008		4	68	60	72	144	144	158	151	140	182	150	1273
2009	140	202	145	129	101	105	106	170	170	182	206	116	1772
2010	147	136	132	150	143	148	164	181	121	157	154	141	1774
2011	122	150	93	172	204	181	182	134	92	139	139	153	1761
2012	94	90	132	148	118	129	133	84	72	112	106	96	1314
2013	90	126	101	130	94	193	172	147	151	143	180	157	1684
2014	129	170	128	113	124	142	148	157	138	70	140	118	1577
2015	114	155	153	107	139	155	107	159	157	97	150	74	1567
2016	132	157	136	142	186	232	168	151	218	174	230	147	2073
2017	142	161	201	185	211	257	180	177	216	229	189	206	2354
2018	272	254	196	202	223	224	173	162	143	261	228	102	2440

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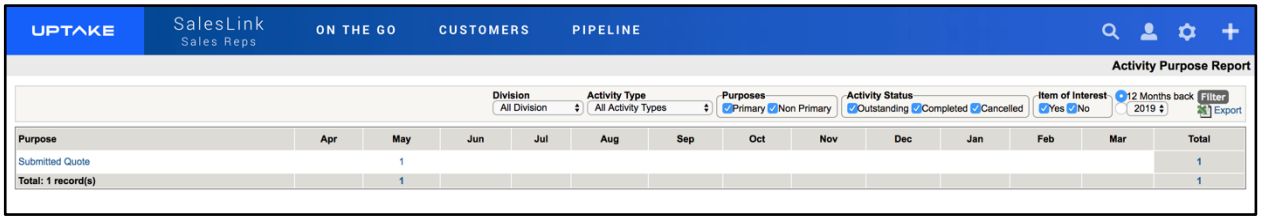
The table is organized by the year and month that the activities occurred. You can filter the table by **Item of Interest** and/or **Division**.

Click on one of the activity numbers to view details regarding all of your activities during that specific month or year.

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

Activities by Purpose

Click the **Activities by Purpose** link under CUSTOMERS in the top navigation bar. A list of all your activities displays organized by their purpose.



Click on a Purpose to view all activities with that associated purpose. You can also click on a number in a month column to view all activities with that associated purpose that occurred during that specific month.

To filter the table:

1. Select which 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 page.

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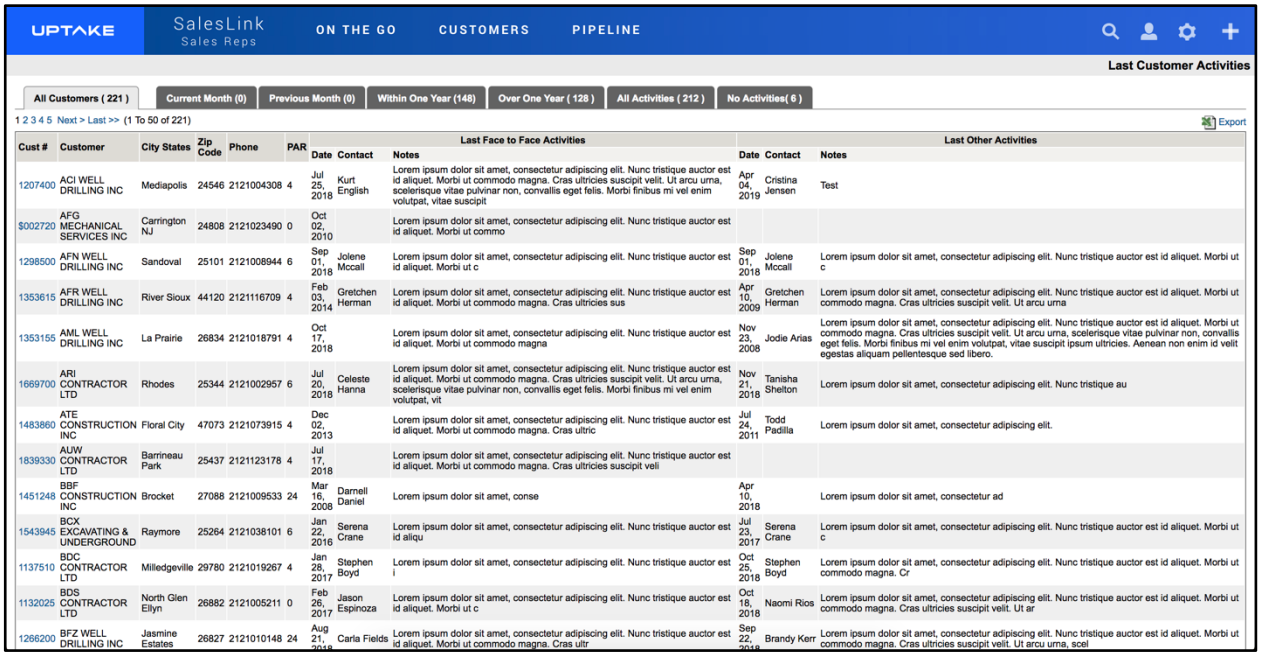
Last Customer Activities

Click on the **Last Customer Activities** link under CUSTOMERS in the top navigation bar. A list of the last customer activities displays, organized alphabetically by customer.



Cust #	Customer	City States	Zip Code	Phone	PAR	Last Face to Face Activities			Last Other Activities		
						Date	Contact	Notes	Date	Contact	Notes
1207400	ACI WELL DRILLING INC	Mediapolis	24546	2121004308	4	Jul 25, 2018	Kurt English	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est id aliquet. Morbi ut commodo magna. Cras ultricies suscipit velit. Ut arcu urna, scelerisque vitae pulvinar non, convallis eget felis. Morbi finibus mi vel enim volutpat, vitae suscipit	Apr 04, 2019	Cristina Jensen	Test
$002720	AFG MECHANICAL SERVICES INC	Carrington NJ	24808	2121023490	0	Oct 02, 2010		Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est id aliquet. Morbi ut commo			
1298500	AFN WELL DRILLING INC	Sandoval	25101	2121008944	6	Sep 01, 2018	Jolene Mccall	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est id aliquet. Morbi ut c	Sep 01, 2018	Jolene Mccall	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est id aliquet. Morbi ut c
1353615	AFR WELL DRILLING INC	River Sioux	44120	2121116709	4	Feb 03, 2014	Gretchen Herman	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est id aliquet. Morbi ut commodo magna. Cras ultricies sus	Apr 10, 2009	Gretchen Herman	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est id aliquet. Morbi ut commodo magna. Cras ultricies suscipit velit. Ut arcu urna
1353155	AML WELL DRILLING INC	La Prairie	26834	2121018791	4	Oct 17, 2018		Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est id aliquet. Morbi ut commodo magna	Nov 23, 2008	Jodie Arias	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est id aliquet. Morbi ut commodo magna. Cras ultricies suscipit velit. Ut arcu urna, scelerisque vitae pulvinar non, convallis eget felis. Morbi finibus mi vel enim volutpat, vitae suscipit ipsum ultricies. Aenean non enim id velit egestas aliquam pellentesque sed libero.
1669700	ARI CONTRACTOR LTD	Rhodes	25344	2121002957	6	Jul 20, 2018	Celeste Hanna	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est id aliquet. Morbi ut commodo magna. Cras ultricies suscipit velit. Ut arcu urna, scelerisque vitae pulvinar non, convallis eget felis. Morbi finibus mi vel enim volutpat, vit	Nov 21, 2018	Tanisha Shelton	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique au
1483860	ATE CONSTRUCTION INC	Floral City	47073	2121073915	4	Dec 02, 2013		Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est id aliquet. Morbi ut commodo magna. Cras ultric	Jul 24, 2011	Todd Padilla	Lorem ipsum dolor sit amet, consectetur adipiscing elit.
1839330	AUW CONTRACTOR LTD	Barrineau Park	25437	2121123178	4	Jul 17, 2018		Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est id aliquet. Morbi ut commodo magna. Cras ultricies suscipit veli			
1451248	BBF CONSTRUCTION INC	Brocket	27088	2121009533	24	Mar 16, 2008	Darnell Daniel	Lorem ipsum dolor sit amet, conse	Apr 10, 2018		Lorem ipsum dolor sit amet, consectetur ad
1543945	BCX EXCAVATING & UNDERGROUND	Raymore	25264	2121038101	6	Jan 22, 2016	Serena Crane	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est id aliqu	Jul 23, 2017	Serena Crane	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est id aliquet. Morbi ut c
1137510	BDC CONTRACTOR LTD	Milledgeville	29780	2121019267	4	Jan 28, 2017	Stephen Boyd	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est i	Oct 25, 2018	Stephen Boyd	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est id aliquet. Morbi ut commodo magna. Cr
1132025	BDS CONTRACTOR LTD	North Glen Ellyn	26882	2121005211	0	Feb 26, 2017	Jason Espinoza	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est id aliquet. Morbi ut c	Oct 18, 2018	Naomi Rios	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est id aliquet. Morbi ut commodo magna. Cras ultricies suscipit velit. Ut ar
1266200	BFZ WELL DRILLING INC	Jasmine Estates	26827	2121010148	24	Aug 21, 2018	Carla Fields	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est id aliquet. Morbi ut commodo magna. Cras ultr	Sep 22, 2018	Brandy Kerr	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est id aliquet. Morbi ut commodo magna. Cras ultricies suscipit velit. Ut arcu urna, scel

The table displays details regarding the last activities performed for each of your customers. Filter the table by selecting one of the tabs at the top.

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

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

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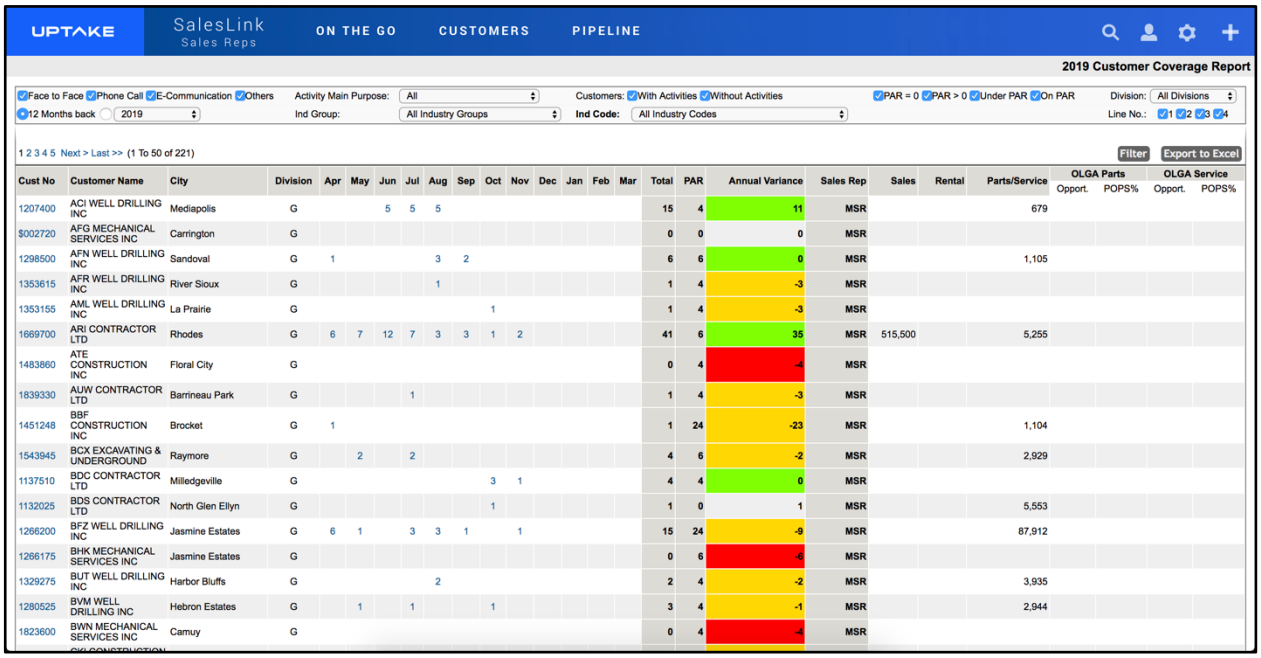
Customer Coverage

Click on the **Customer Coverage** link under CUSTOMERS in the top navigation bar. The report that displays represents all your completed activities and whether that coverage is in line with the PAR of the Customer.



Cust No	Customer Name	City	Division	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total	PAR	Annual Variance	Sales Rep	Sales	Rental	Parts/Service	OLGA Parts Opport.	OLGA Parts POPS%	OLGA Service Opport.	OLGA Service POPS%
1207400	ACI WELL DRILLING INC	Mediapolis	G			5	5	5								15	4	11	MSR			679				
$002720	AFG MECHANICAL SERVICES INC	Carrington	G													0	0	0	MSR							
1298500	AFN WELL DRILLING INC	Sandoval	G	1				3	2							6	6	0	MSR			1,105				
1353615	AFR WELL DRILLING INC	River Sioux	G					1								1	4	-3	MSR							
1353155	AML WELL DRILLING INC	La Prairie	G							1						1	4	-3	MSR							
1669700	ARI CONTRACTOR LTD	Rhodes	G	6	7	12	7	3	3	1	2					41	6	35	MSR	515,500		5,255				
1483860	ATE CONSTRUCTION INC	Floral City	G													0	4	-4	MSR							
1839330	AUW CONTRACTOR LTD	Barrineau Park	G				1									1	4	-3	MSR							
1451248	BBF CONSTRUCTION INC	Brocket	G	1												1	24	-23	MSR			1,104				
1543945	BCX EXCAVATING & UNDERGROUND	Raymore	G		2		2									4	6	-2	MSR			2,929				
1137510	BDC CONTRACTOR LTD	Milledgeville	G							3	1					4	4	0	MSR							
1132025	BDS CONTRACTOR LTD	North Glen Ellyn	G							1						1	0	1	MSR			5,553				
1266200	BFZ WELL DRILLING INC	Jasmine Estates	G	6	1		3	3	1		1					15	24	-9	MSR			87,912				
1266175	BHK MECHANICAL SERVICES INC	Jasmine Estates	G													0	6	-6	MSR							
1329275	BUT WELL DRILLING INC	Harbor Bluffs	G					2								2	4	-2	MSR			3,935				
1280525	BVM WELL DRILLING INC	Hebron Estates	G		1		1			1						3	4	-1	MSR			2,944				
1823600	BWN MECHANICAL SERVICES INC	Camuy	G													0	4	-4	MSR							

The table is displayed in alphabetical order according to customer. Click on a table header to sort that column in ascending or descending order.

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.

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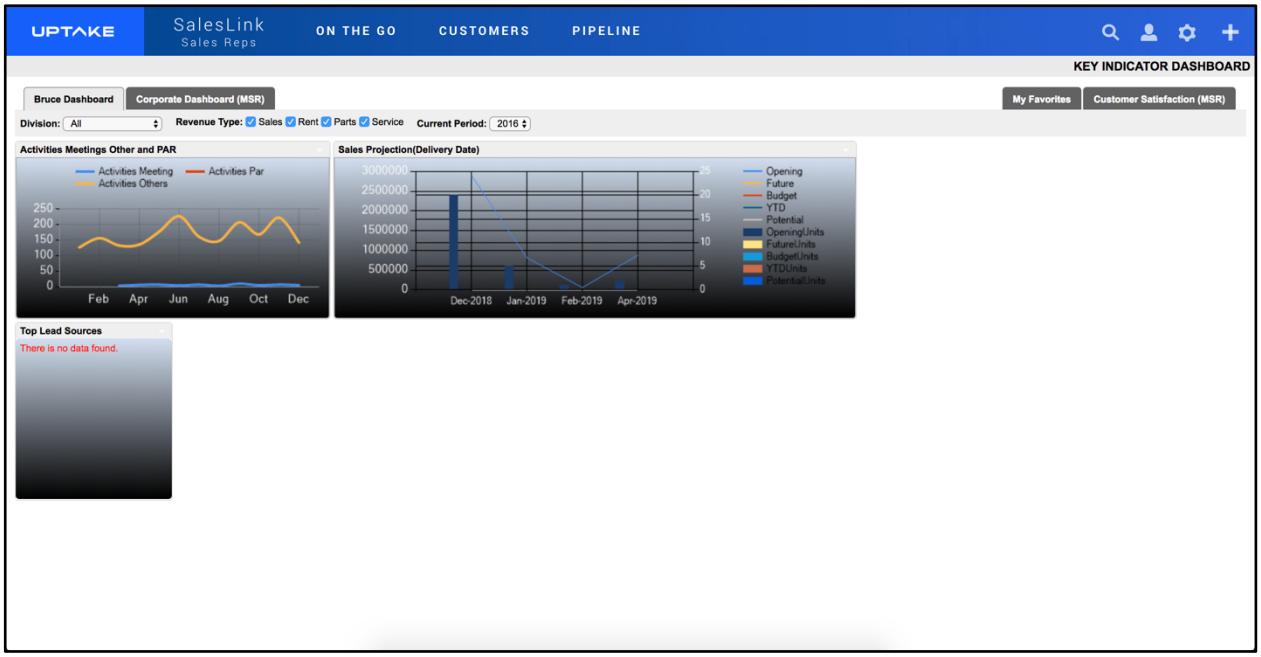
Leads and Opportunities

Key Indicator Dashboard

Click the **Key Indicator Dashboard** link under ON THE GO in the top navigation bar. A series of useful visual metrics will be displayed on your personal dashboard.



Toggle between dashboards by clicking on the tabs at the top of the page. Each dashboard displays different widgets containing valuable at-a-glance information.

To filter the widgets:

1. Select the fields you want to filter by at the top of the page.
2. Select the year you want to filter from.

The widgets will automatically update as filters are applied.

Add to My Favorites

1. Click the down arrow at the top right corner of the widget you want to add to the My Favorites dashboard.
2. Select **My Favorites** under Add to Dashboards.

You can add as many widgets as you want to create a personalized My Favorites dashboard. To remove a widget, click the X next to the down arrow at the top right.

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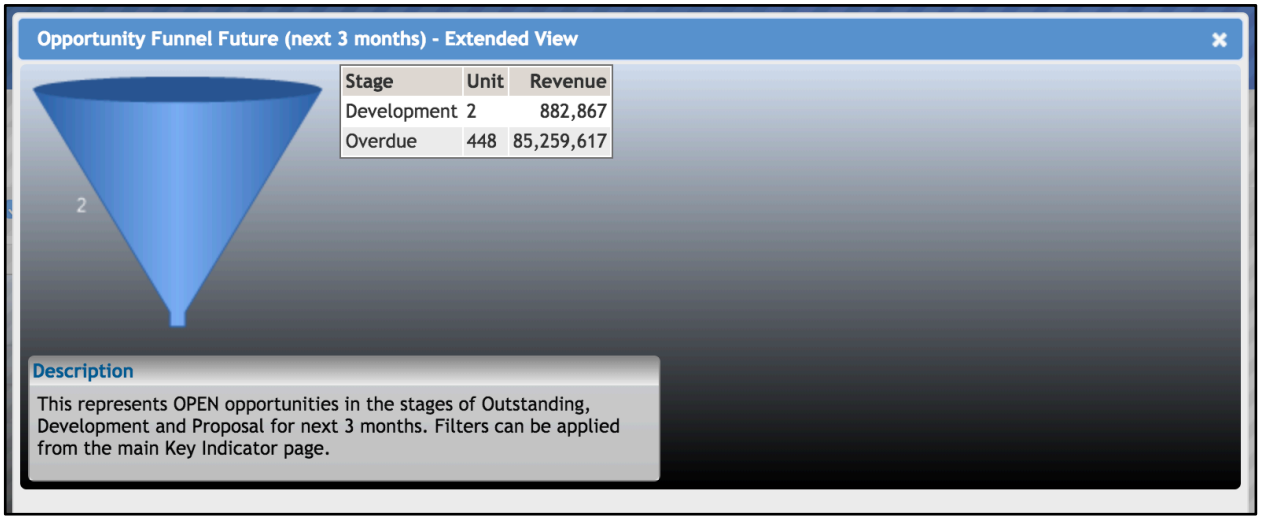
Extended View

To display an Extended View of a widget, click the down arrow and select **Extended View** under Views, or click anywhere inside the body of the widget.



The Extended View contains the same information as the original widget, along with a more detailed description and links related to the source data (if available).

Add New Lead

To add a new lead:

1. Click the Plus icon at the far right of the top navigation bar, then click the **[Add Lead]** button in the drop-down menu. Alternatively, click the **Lead** link to the left of the Calendar in the Home page, then click the **[Add Lead]** button at the top right of the Leads page.
2. Enter all required information into the fields in the Add New Lead form.
3. Once the lead's Division and Type have been specified, you will have the option of entering information into the Product section.
4. Click the **[Save Lead]** button.

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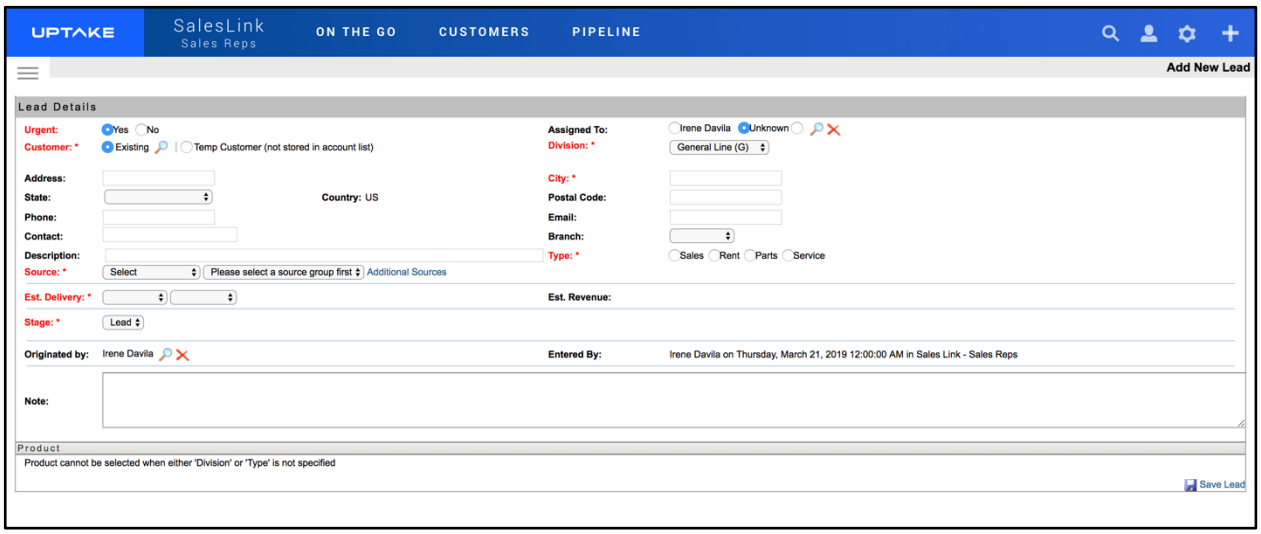

Once a lead has been created it will be added to the Leads page.

Edit Lead

To edit a lead:

1. Select a lead from the Leads page. You will be taken to its Lead Details page.
2. Make all necessary changes to the lead.
3. Click the **[Save Lead]** button at the bottom right of the page.

You can also edit certain fields in each lead simultaneously by clicking the **[Edit All]** button at the top right of the Leads page and making all necessary changes, then clicking the **[Save All]** button.

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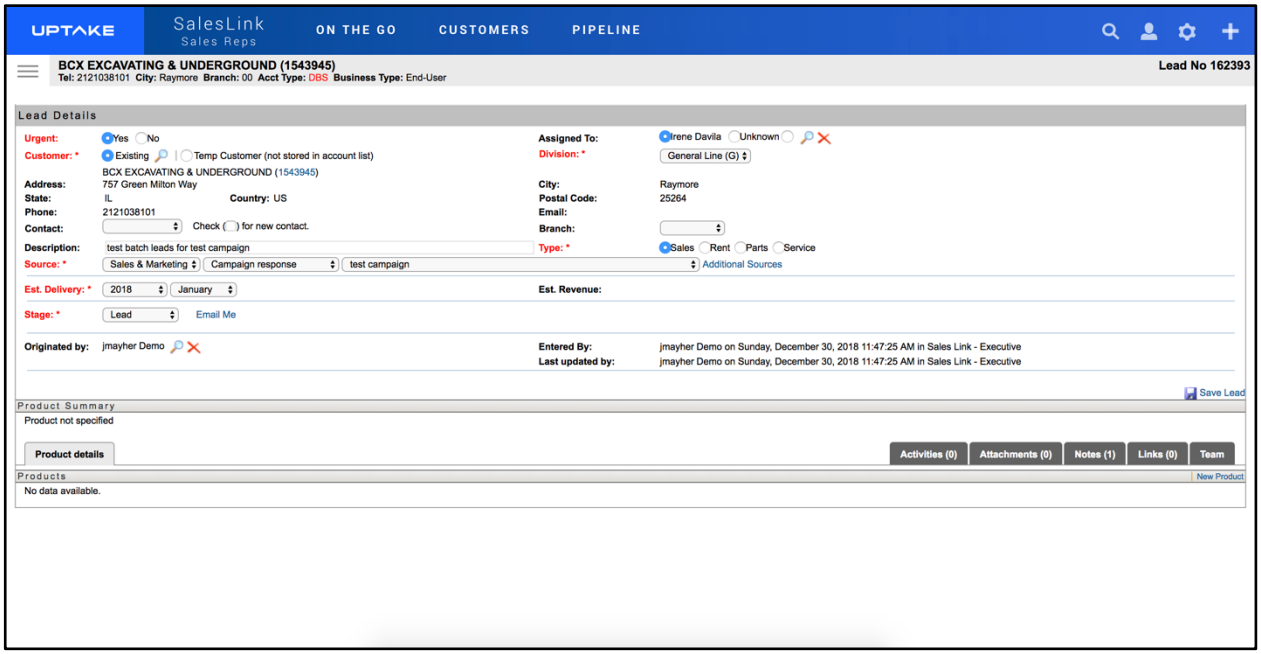
Transfer Lead to Opportunity

The Leads page displays a list of all leads that need to be followed up on. Click on a lead to view its Lead details.



1. Add any activities that occurred when following up on the lead by clicking the Activities tab at the bottom of the page, then click the **[New]** button.
2. Enter all required information into the Add New Activity form, then click **[Save Activity]** to add it to the lead.
3. In the Lead Details section, click the **Stage** drop-down menu and select the current stage of the lead (Outstanding, Development, or Proposal) to promote the lead to an opportunity.
4. Click the **[Save Lead]** button to promote the lead to an opportunity.

As the opportunity is worked on, Product details, Notes, Attachments, Quotes, etc., can be added to the Opportunity Details page.

Transfer Lead to No Lead

From the Leads page, click on a lead to view its Lead details.

1. Add any activities that occurred when following up on the lead by clicking the Activities tab at the bottom of the page, then click the **[New]** button.
2. Enter all required information into the Add New Activity form, then click **[Save Activity]** to add it to the lead.
3. If it becomes apparent that the lead is not going anywhere, click the **Stage** drop-down menu and select No Lead.
4. Click the **[Save Lead]** button transfer the lead to No Lead.

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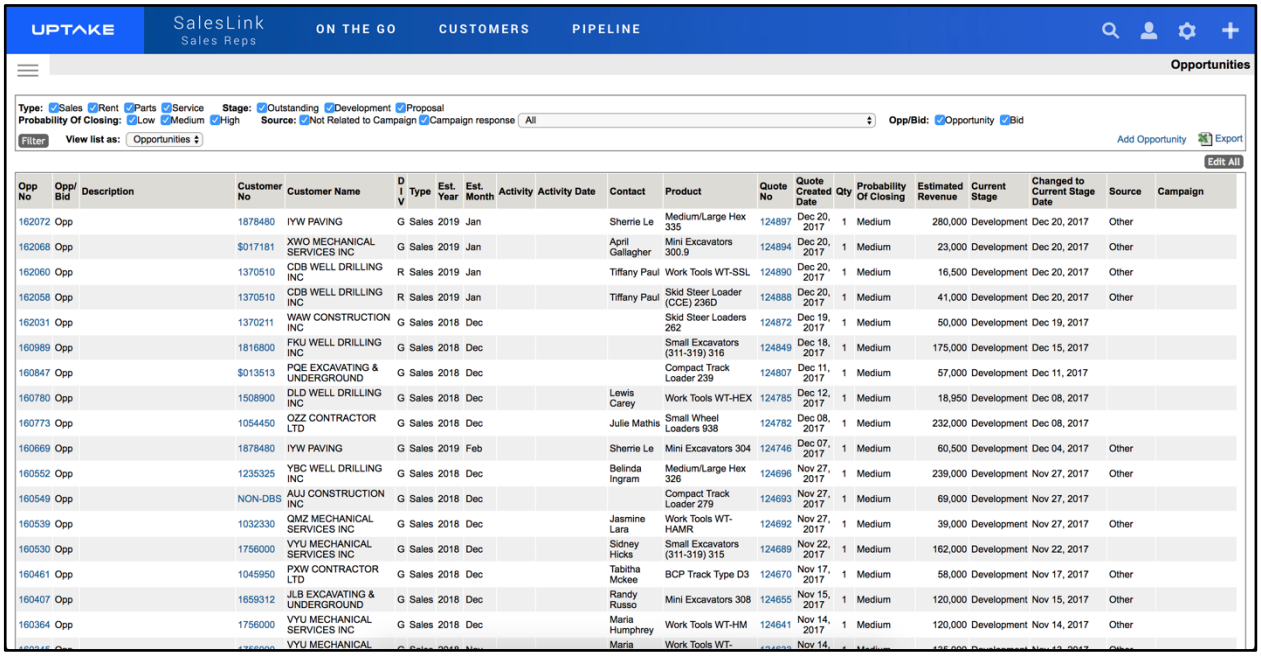
NOTE: Once a lead has been transferred to No Lead it cannot be edited. If the lead needs to be reopened, a new lead must be created.

Add New Opportunity

Opportunities can be created without having to go through the Lead stage first. To view a list of all current opportunities, click the **Open Opportunities** link under ON THE GO in the top navigation bar.



Opp No	Opp/ Bid	Description	Customer No	Customer Name	D I V	Type	Est. Year	Est. Month	Activity	Activity Date	Contact	Product	Quote No	Quote Created Date	Qty	Probability Of Closing	Estimated Revenue	Current Stage	Changed to Current Stage Date	Source	Campaign
162072	Opp		1878480	IYW PAVING	G	Sales	2019	Jan			Sherrie Le	Medium/Large Hex 335	124897	Dec 20, 2017	1	Medium	280,000	Development	Dec 20, 2017	Other	
162068	Opp		$017181	XWO MECHANICAL SERVICES INC	G	Sales	2019	Jan			April Gallagher	Mini Excavators 300.9	124894	Dec 20, 2017	1	Medium	23,000	Development	Dec 20, 2017	Other	
162060	Opp		1370510	CDB WELL DRILLING INC	R	Sales	2019	Jan			Tiffany Paul	Work Tools WT-SSL	124890	Dec 20, 2017	1	Medium	16,500	Development	Dec 20, 2017	Other	
162058	Opp		1370510	CDB WELL DRILLING INC	R	Sales	2019	Jan			Tiffany Paul	Skid Steer Loader (CCE) 236D	124888	Dec 20, 2017	1	Medium	41,000	Development	Dec 20, 2017	Other	
162031	Opp		1370211	WAW CONSTRUCTION INC	G	Sales	2018	Dec				Skid Steer Loaders 262	124872	Dec 19, 2017	1	Medium	50,000	Development	Dec 19, 2017		
160989	Opp		1816800	FKU WELL DRILLING INC	G	Sales	2018	Dec				Small Excavators (311-319) 316	124849	Dec 18, 2017	1	Medium	175,000	Development	Dec 15, 2017		
160847	Opp		$013513	PQE EXCAVATING & UNDERGROUND	G	Sales	2018	Dec				Compact Track Loader 239	124807	Dec 11, 2017	1	Medium	57,000	Development	Dec 11, 2017		
160780	Opp		1508900	DLD WELL DRILLING INC	G	Sales	2018	Dec			Lewis Carey	Work Tools WT-HEX	124785	Dec 12, 2017	1	Medium	18,950	Development	Dec 08, 2017		
160773	Opp		1054450	OZZ CONTRACTOR LTD	G	Sales	2018	Dec			Julie Mathis	Small Wheel Loaders 938	124782	Dec 08, 2017	1	Medium	232,000	Development	Dec 08, 2017		
160669	Opp		1878480	IYW PAVING	G	Sales	2019	Feb			Sherrie Le	Mini Excavators 304	124746	Dec 07, 2017	1	Medium	60,500	Development	Dec 04, 2017	Other	
160552	Opp		1235325	YBC WELL DRILLING INC	G	Sales	2018	Dec			Belinda Ingram	Medium/Large Hex 326	124696	Nov 27, 2017	1	Medium	239,000	Development	Nov 27, 2017	Other	
160549	Opp		NON-DBS	AUJ CONSTRUCTION INC	G	Sales	2018	Dec				Compact Track Loader 279	124693	Nov 27, 2017	1	Medium	69,000	Development	Nov 27, 2017		
160539	Opp		1032330	QMZ MECHANICAL SERVICES INC	G	Sales	2018	Dec			Jasmine Lara	Work Tools WT-HAMR	124692	Nov 27, 2017	1	Medium	39,000	Development	Nov 27, 2017	Other	
160530	Opp		1756000	VYU MECHANICAL SERVICES INC	G	Sales	2018	Dec			Sidney Hicks	Small Excavators (311-319) 315	124689	Nov 22, 2017	1	Medium	162,000	Development	Nov 22, 2017		
160461	Opp		1045950	PXW CONTRACTOR LTD	G	Sales	2018	Dec			Tabitha Mckee	BCP Track Type D3	124670	Nov 17, 2017	1	Medium	58,000	Development	Nov 17, 2017	Other	
160407	Opp		1659312	JLB EXCAVATING & UNDERGROUND	G	Sales	2018	Dec			Randy Russo	Mini Excavators 308	124655	Nov 15, 2017	1	Medium	120,000	Development	Nov 15, 2017	Other	
160364	Opp		1756000	VYU MECHANICAL SERVICES INC	G	Sales	2018	Dec			Maria Humphrey	Work Tools WT-HM	124641	Nov 14, 2017	1	Medium	120,000	Development	Nov 14, 2017	Other	
				VYU MECHANICAL							Maria	Work Tools WT-		Nov 14,							

The Opportunities page displays a list of all currently open opportunities, starting with the most recent.

To filter the list:

1. Select the fields you want to filter by at the top of the page.
2. Click the **[Filter]** button.

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

To add a new opportunity:

1. Click the Plus icon at the far right of the top navigation bar, then click the **[Add New Opportunity]** button in the drop-down menu. Alternatively, click the **All Outstanding Opportunities** link to the left of the Calendar in the Home page, then click the **[Add Lead]** button at the top right of the Opportunities page.
2. Select whether this is an Opportunity or a Bid.
3. Enter all required information into the fields in the Add New Opportunity form.

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4. Once the opportunity's Division and Type have been specified, you will have the option to enter information into the Product section.
5. Click the **[Save Opportunity]** button.

Edit Opportunity
To edit an opportunity:

1. Select an opportunity from the Opportunities page. You will be taken to its Opportunity Details page.
2. Make all necessary changes to the opportunity.
3. Click the **[Save Opportunity]** button at the bottom right of the page.

You can also edit certain fields in each opportunity simultaneously by clicking the **[Edit All]** button at the top right of the Opportunities page and making all necessary changes, then clicking the **[Save All]** button.

Opportunity Stages

Stages of completion are assigned according to which stage the deal is currently in.

- **Outstanding:** An opportunity to sell something has been identified and qualified, but the sales rep has not started working on it.

- **Development:** The sales rep has started working on this opportunity, such as gathering requirements from the customer or internal requirements from the dealership. A quote has been started and is in progress.

- **Proposal:** The sales rep has completed a quote and has submitted it to the customer for review. This stage represents outstanding quotes to customers that are still in negotiation, re-quoting stages, or waiting for customer acceptance.

NOTE: If the opportunity is changed to the following stages, the information can no longer be edited and the stage cannot be changed back to previous stage types.

- **Won:** The customer has proceeded with the proposal and will purchase the equipment. When changing to this stage additional information is necessary in order to save the opportunity.

- **Lost:** The customer has decided to go with a competitor. The lost sale page will appear and must be completed to save the opportunity at this stage. This Lost Sales information will appear in certain reports in SalesLink Reps.

- **No Deal:** The customer has decided not to purchase. The only additional information that will be necessary is the reason.

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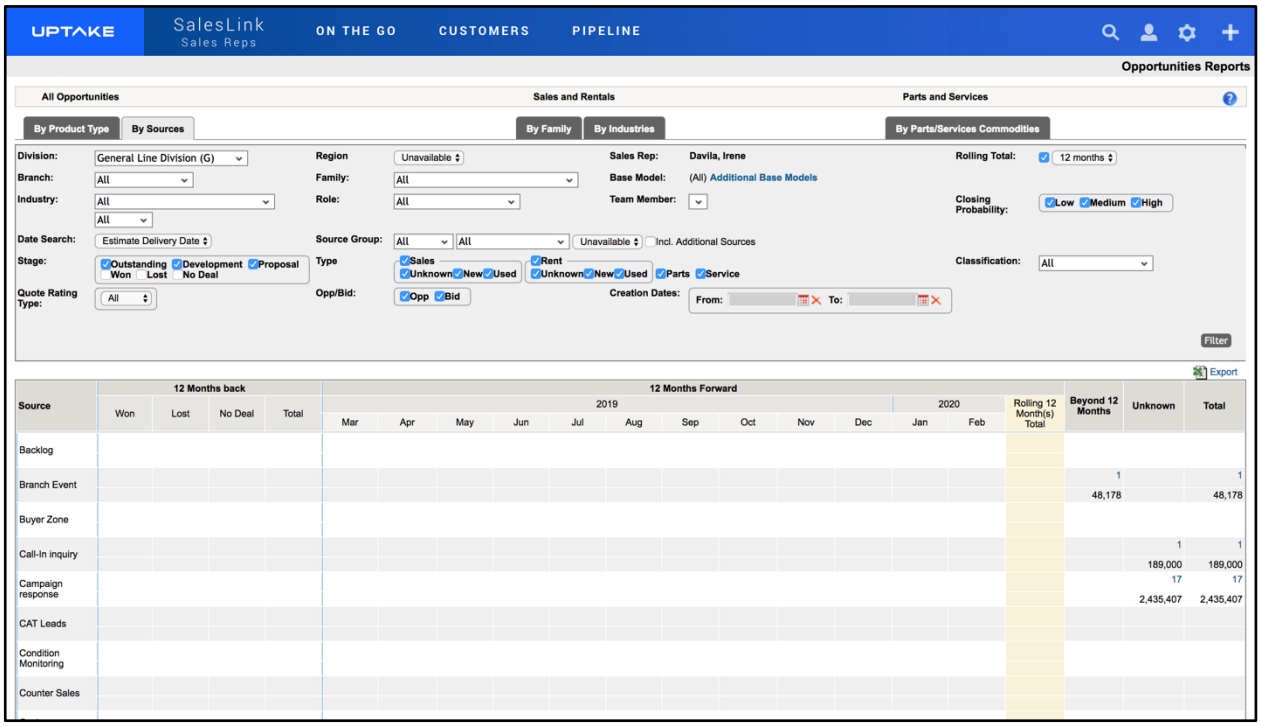
Opportunities Reports

Generate reports about your opportunities by clicking the **Opportunities By Source** link under PIPELINE in the top navigation bar. A table of past and future opportunities organized by Source is displayed.



Click on the tabs at the top of the screen to organize your opportunities by different categories. The table will automatically update as each tab is selected.

To filter the table:

1. Select the fields you want to filter by.
2. Select a date range to filter by.
3. Click the **[Filter]** button.

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

Click the Question (?) icon at the top right of the page for more information on filter options and results.

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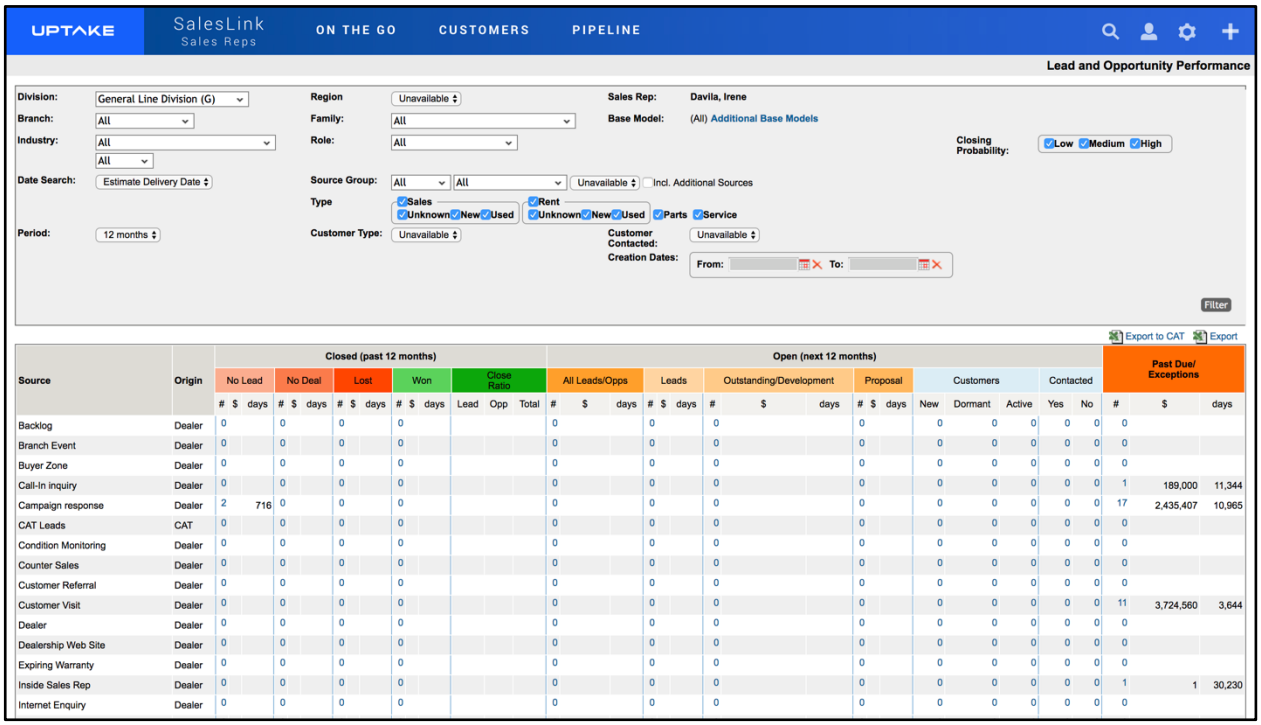
Lead and Opportunity Performance

Generate a Lead and Opportunity Performance Report by clicking the **Lead and Opportunity Performance** link under PIPELINE in the top navigation bar. A table of your Closed and Open leads and Opportunities displays, organized by Source.



Source	Origin	Closed (past 12 months)										Open (next 12 months)																				
		No Lead			No Deal			Lost			Won			Close Ratio			All Leads/Opps			Leads			Outstanding/Development			Proposal			Customers			Contacted		Past Due/ Exceptions		
		#	$	days	#	$	days	#	$	days	#	$	days	Lead	Opp	Total	#	$	days	#	$	days	#	$	days	#	$	days	New	Dormant	Active	Yes	No	#	$	days
Backlog	Dealer	0			0			0			0						0			0			0			0			0			0				
Branch Event	Dealer	0			0			0			0						0			0			0			0			0			0				
Buyer Zone	Dealer	0			0			0			0						0			0			0			0			0			0				
Call-In inquiry	Dealer	0			0			0			0						0			0			0			0			0			0		1	189,000	11,344
Campaign response	Dealer	2	716		0			0			0						0			0			0			0			0			0		17	2,435,407	10,965
CAT Leads	CAT	0			0			0			0						0			0			0			0			0			0				
Condition Monitoring	Dealer	0			0			0			0						0			0			0			0			0			0				
Counter Sales	Dealer	0			0			0			0						0			0			0			0			0			0				
Customer Referral	Dealer	0			0			0			0						0			0			0			0			0			0				
Customer Visit	Dealer	0			0			0			0						0			0			0			0			0			0		11	3,724,560	3,644
Dealer	Dealer	0			0			0			0						0			0			0			0			0			0				
Dealership Web Site	Dealer	0			0			0			0						0			0			0			0			0			0				
Expiring Warranty	Dealer	0			0			0			0						0			0			0			0			0			0				
Inside Sales Rep	Dealer	0			0			0			0						0			0			0			0			0			0		1	1	30,230
Internet Enquiry	Dealer	0			0			0			0						0			0			0			0			0			0				

To filter the table:

1. Select the fields you want to filter by.
2. Select a date range to filter by.
3. Click the **[Filter]** button.

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

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

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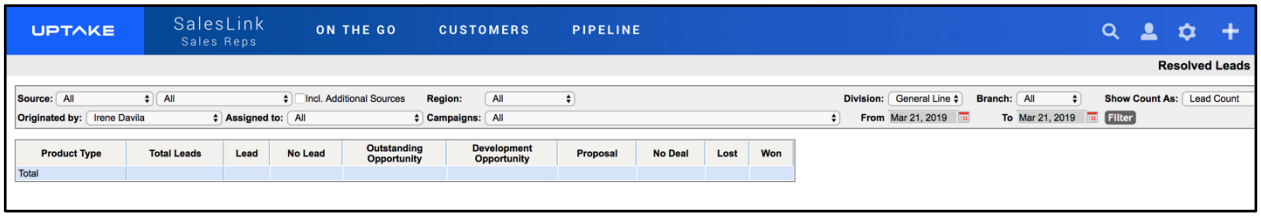
My Resolved Leads

Click the **My Resolved Leads** link under PIPELINE in the top navigation bar. A table of information regarding your currently resolved leads displays.



To filter the table:

1. Select the fields you want to filter by.
2. Select a date range to filter by.
3. Click the **[Filter]** button.

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Territory

Add New Customer

To add a new customer:

1. Click the Plus icon at the far right of the top navigation bar.
2. Select **[Add New Customer]** from the drop-down menu.
3. Enter all required information into the Add New Customer form.
4. Click **[Submit]** to create the new customer.

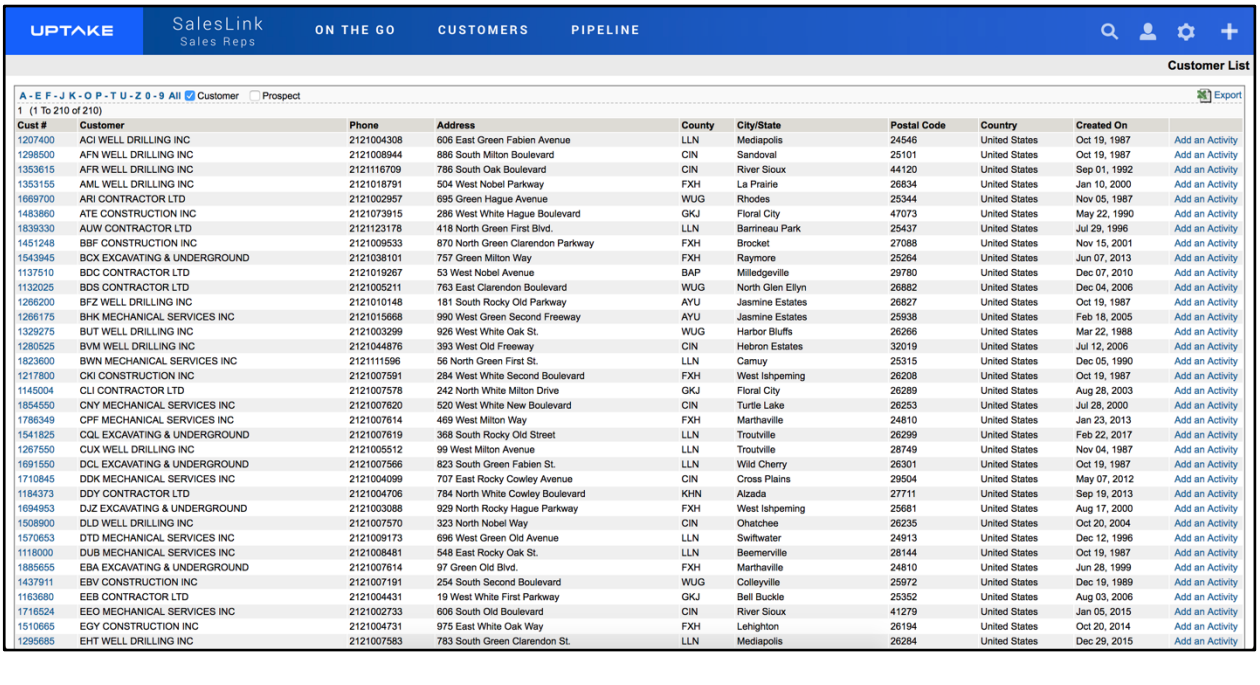
Add New Prospect

To add a new prospect:

1. Click the Plus icon at the far right of the top navigation bar.
2. Select **[Add New Prospect]** from the drop-down menu.
3. Enter all required information into the Add New Prospect form.
4. Click **[Submit]** to create the new prospect.

Customer List

Click the **Customer List** link under ON THE GO in the top navigation bar. A list of all your customers displays.



The list automatically displays details regarding current customers. Select the Prospect checkbox at the top right of the list if you want to view prospective customers.

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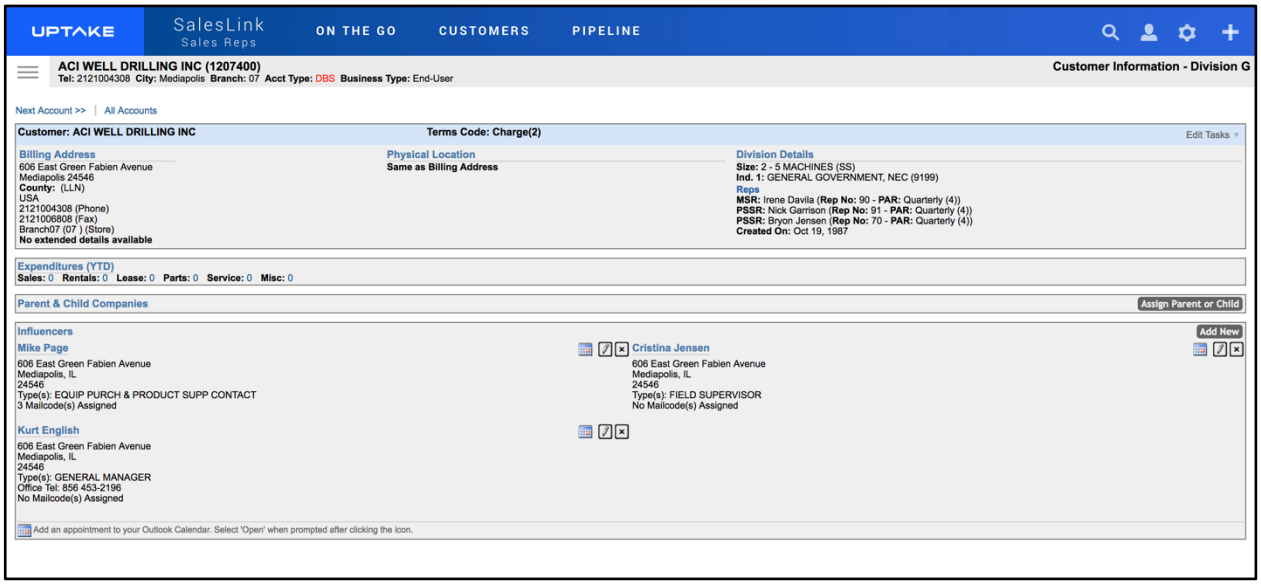
Export the table into an Excel spreadsheet by clicking the **[Export]** button at the top right of the table.

Customer Details

Click on a Customer Number to view its Customer Details page.



This page displays detailed information regarding a specific customer, including its Address, Expenditures, Influencers, etc.

Edit or delete the customer by hovering your cursor over the **Edit Tasks** drop-down menu and selecting the task you want to perform.

Add a Parent or Child company to the customer by clicking the **[Assign Parent or Child]** button. Fill in the form and then click **[Submit]**.

Add a new influencer by clicking the **[Add New]** button. Fill in the form and then click **[Submit]**. You can then add an appointment, edit, or delete an influencer by clicking on one of the icons next to their details.

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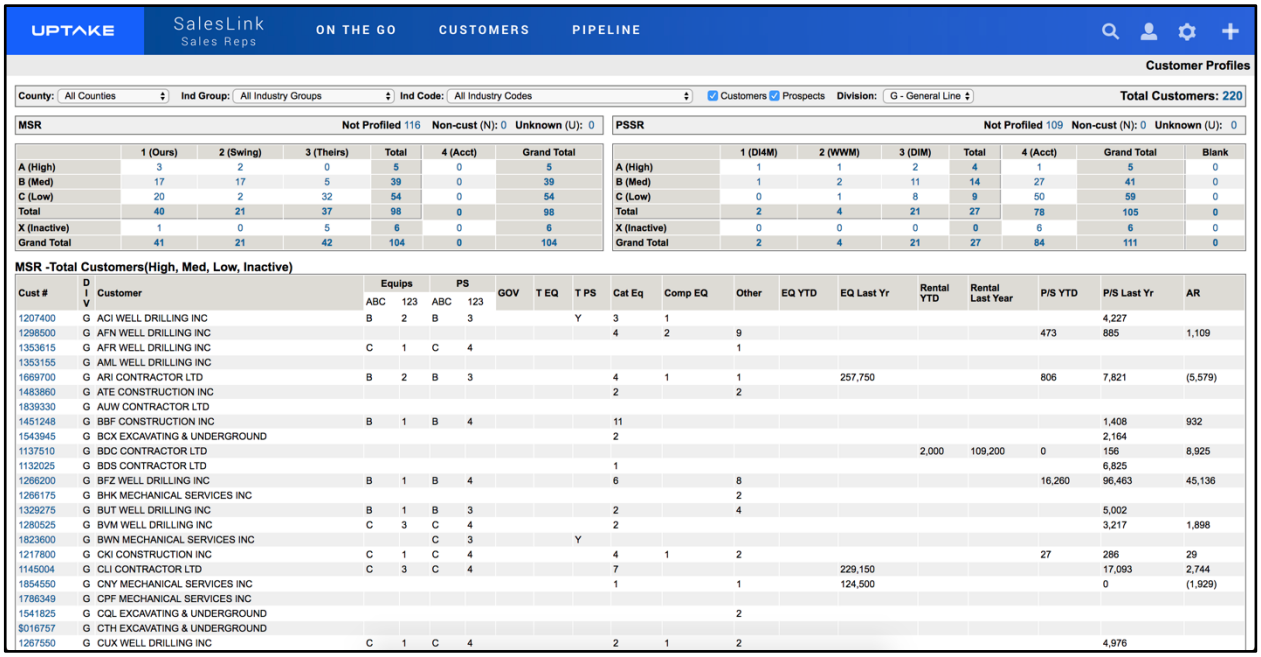
Customers Segmentation

Click the **Customers Segmentation** link under CUSTOMERS in the top navigation bar. The Customer Profiles page displays.



UPTAKE SalesLink Sales Reps ON THE GO CUSTOMERS PIPELINE

Customer Profiles

County: All Counties | Ind Group: All Industry Groups | Ind Code: All Industry Codes | Customers Prospects | Division: G - General Line | Total Customers: 220

MSR — Not Profiled 116 Non-cust (N): 0 Unknown (U): 0

	1 (Ours)	2 (Swing)	3 (Theirs)	Total	4 (Acct)	Grand Total
A (High)	3	2	0	5	0	5
B (Med)	17	17	5	39	0	39
C (Low)	20	2	32	54	0	54
Total	40	21	37	98	0	98
X (Inactive)	1	0	5	6	0	6
Grand Total	41	21	42	104	0	104

PSSR — Not Profiled 109 Non-cust (N): 0 Unknown (U): 0

	1 (DI4M)	2 (WWM)	3 (DIM)	Total	4 (Acct)	Grand Total	Blank
A (High)	1	1	2	4	1	5	0
B (Med)	1	2	11	14	27	41	0
C (Low)	0	1	8	9	50	59	0
Total	2	4	21	27	78	105	0
X (Inactive)	0	0	0	0	6	6	0
Grand Total	2	4	21	27	84	111	0

MSR -Total Customers(High, Med, Low, Inactive)

Cust #	DIV	Customer	Equips ABC	Equips 123	PS ABC	PS 123	GOV	T EQ	T PS	Cat Eq	Comp EQ	Other	EQ YTD	EQ Last Yr	Rental YTD	Rental Last Year	P/S YTD	P/S Last Yr	AR
1207400	G	ACI WELL DRILLING INC	B	2	B	3			Y	3	1							4,227	
1298500	G	AFN WELL DRILLING INC								4	2	9					473	885	1,109
1353615	G	AFR WELL DRILLING INC	C	1	C	4						1							
1353155	G	AML WELL DRILLING INC																	
1669700	G	ARI CONTRACTOR LTD	B	2	B	3				4	1	1		257,750			806	7,821	(5,579)
1483860	G	ATE CONSTRUCTION INC								2		2							
1839330	G	AUW CONTRACTOR LTD																	
1451248	G	BBF CONSTRUCTION INC	B	1	B	4				11								1,408	932
1543945	G	BCX EXCAVATING & UNDERGROUND								2								2,164	
1137510	G	BDC CONTRACTOR LTD													2,000	109,200	0	156	8,925
1132025	G	BDS CONTRACTOR LTD								1								6,825	
1266200	G	BFZ WELL DRILLING INC	B	1	B	4				6		8					16,260	96,463	45,136
1266175	G	BHK MECHANICAL SERVICES INC										2							
1329275	G	BUT WELL DRILLING INC	B	1	B	3				2		4						5,002	
1280525	G	BVM WELL DRILLING INC	C	3	C	4				2								3,217	1,898
1823600	G	BWN MECHANICAL SERVICES INC			C	3			Y										
1217800	G	CKI CONSTRUCTION INC	C	1	C	4				4	1	2					27	286	29
1145004	G	CLI CONTRACTOR LTD	C	3	C	4				7				229,150				17,093	2,744
1854550	G	CNY MECHANICAL SERVICES INC								1		1		124,500				0	(1,929)
1786349	G	CPF MECHANICAL SERVICES INC																	
1541825	G	CQL EXCAVATING & UNDERGROUND										2							
$016757	G	CTH EXCAVATING & UNDERGROUND																	
1267550	G	CUX WELL DRILLING INC	C	1	C	4				2	1	2						4,976	

This page displays three tables with in-depth details regarding your current customers. Use the filters at the top of the page to narrow down the customers that are displayed. The tables will automatically update as each filter is selected.

MSR Definitions

Loyalty:

- **Ours:** Customer mainly purchases equipment sold by your dealership (75%+ of units) and your dealership is viewed as a preferred supplier for equipment needs.
- **Swing:** Customer's fleet is mixed between your dealership offerings and competitive units (40%-75%). Customer will purchase from supplier who offers best deal; not loyal to a brand.
- **Theirs:** Customer's fleet is mainly competitive equipment (Your dealership's supplied content is under 40%). This customer may be a loyal one, but not to your dealership.
- **Acct:** Sub-account of another – listed as an Accounting account in order to only show this customer once in the main profiles.
- **Non-Customer:** Supplier, Competitor, Vendor. A company that may, for example, buy parts from your dealership but would never buy equipment.

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- **Unknown:** The sales rep has not met the customer and is not aware of what the potential is.

Growth:

- **High:** There is a 75%+ chance this customer will purchase equipment in the upcoming 12-18 month buying season.

- **Med:** There is a 50% chance this customer will purchase equipment in the upcoming 12-18 month buying season.

- **Low:** This customer is unlikely to be in market within the upcoming 12-18 month buying season.

- **Inact:** Account is inactive at this time and it is doubtful that any M&S revenue will be achieved.

PSSR Definitions

Loyalty:

- **DI4M (Do It for Me):** You have a relationship with this customer with possible maintenance agreements on the majority of their fleet. This customer uses your shops and field mechanics almost exclusively to look after their equipment and purchases the majority of their equipment parts from your dealership.

- **WWM (Work with Me):** This customer will pick and choose the work that he has your dealership 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 PMs for the customer.

- **DIM (Do It Myself):** This customer prefers to do the work themselves with their own mechanics, or at another shop facility other than yours. He will shop his parts around, uses “will-fit” and/or service labor except for warranty work.

- **Acct:** Sub-account of another – listed as an Accounting account in order to only show this customer once in the main profiles

  Non-Customer: Supplier, Competitor, Vendor. A company that may, for example, buy parts from your dealership but would never buy equipment.

- **Unknown:** The sales rep has not met the customer and is not aware of what the potential is.

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Growth:

- **High:** There is a high probability that you can increase your P&S revenue with this customer this year over the past year. Possibility exists to increase revenue at least 10% over the total levels of past year. Strong opportunity with this account.

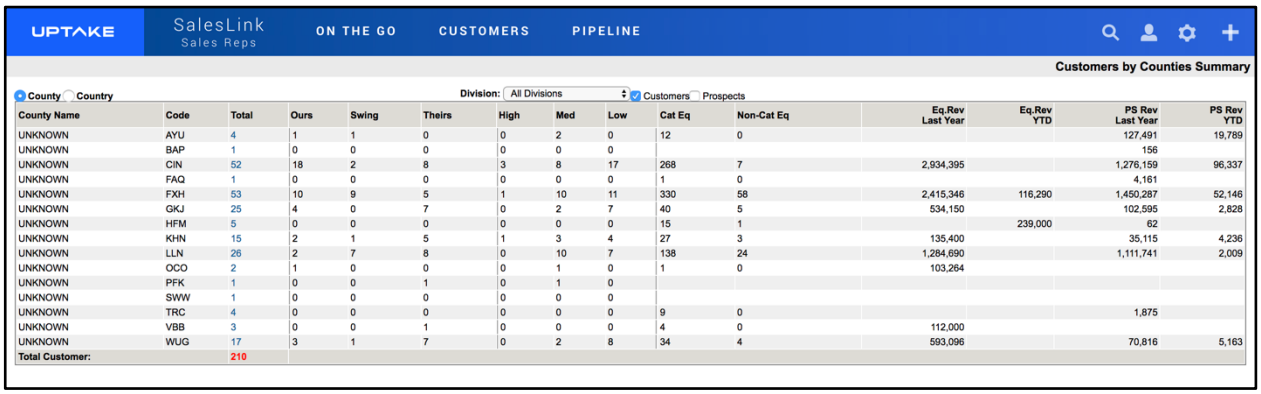
- **Med:** There is a 50% chance that you can increase P&S revenues with this customer over the levels of the past year. You anticipate that with some targeted efforts, this customer spend with our P&S shops can increase over the levels of the past year.

- **Low:** You don't believe this customer's P&S spending can be increased over the coming year over the past year's dollar revenue. It is probable that the same level of revenue will be achieved as in the previous year.

- **Inact:** Account is mostly inactive at this time and it is doubtful that any P&S revenue will be achieved.

Customers by Counties

Click the **Customers By Counties** link under CUSTOMERS in the top navigation bar. The Customers by Counties Summary page displays.



County Name	Code	Total	Ours	Swing	Theirs	High	Med	Low	Cat Eq	Non-Cat Eq	Eq.Rev Last Year	Eq.Rev YTD	PS Rev Last Year	PS Rev YTD
UNKNOWN	AYU	4	1	1	0	0	2	0	12	0			127,491	19,789
UNKNOWN	BAP	1	0	0	0	0	0	0					156	
UNKNOWN	CIN	52	18	2	8	3	8	17	268	7	2,934,395		1,276,159	96,337
UNKNOWN	FAQ	1	0	0	0	0	0	0	1	0			4,161	
UNKNOWN	FXH	53	10	9	5	1	10	11	330	58	2,415,346	116,290	1,450,287	52,146
UNKNOWN	GKJ	25	4	0	7	0	2	7	40	5	534,150		102,595	2,828
UNKNOWN	HFM	5	0	0	0	0	0	0	15	1		239,000	62	
UNKNOWN	KHN	15	2	1	5	1	3	4	27	3	135,400		35,115	4,236
UNKNOWN	LLN	26	2	7	8	0	10	7	138	24	1,284,690		1,111,741	2,009
UNKNOWN	OCO	2	1	0	0	0	1	0	1	0	103,264			
UNKNOWN	PFK	1	0	0	1	0	1	0						
UNKNOWN	SWW	1	0	0	0	0	0	0						
UNKNOWN	TRC	4	0	0	0	0	0	0	9	0			1,875	
UNKNOWN	VBB	3	0	0	1	0	0	0	4	0	112,000			
UNKNOWN	WUG	17	3	1	7	0	2	8	34	4	593,096		70,816	5,163
Total Customer:		210												

This page displays a table of current customer revenue details organized by county. You can select a different division using the **Division** drop-down menu at the top of the page. Click the **Prospects** checkbox to view prospective customers in the table.

Click the **Country** checkbox at the top left of the page to view a table of current customer revenue details organized by country.

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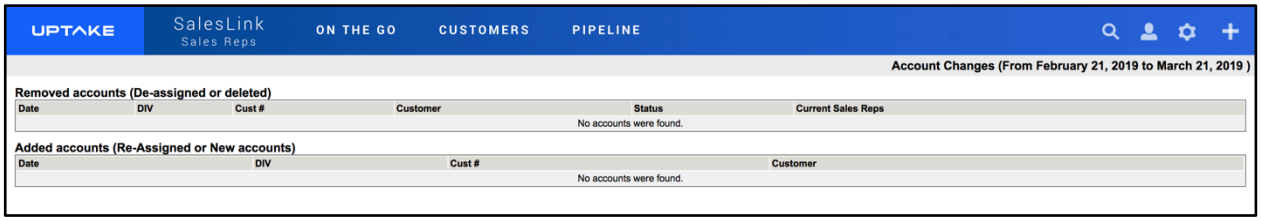
Territory Changes

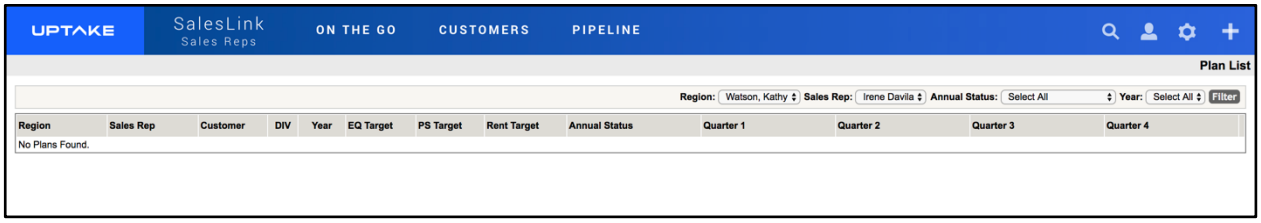
Click the **Territory Changes** link under CUSTOMERS in the top navigation bar. The Account Changes page displays.



This page displays customer account changes that occurred over the past month. Deassigned or Deleted accounts are displayed in the Removed accounts table at the top of the page. Reassigned or New Accounts are displayed in the Added accounts table below.

Account Plans

Click the **Account Plans** link under ON THE GO in the top navigation bar. The Plan List page displays.



This page displays a detailed table of sales rep plans for generating future revenue from customers.

To filter the table:

1. Select the fields you want to filter by at the top of the page.
2. Click the **[Filter]** button.

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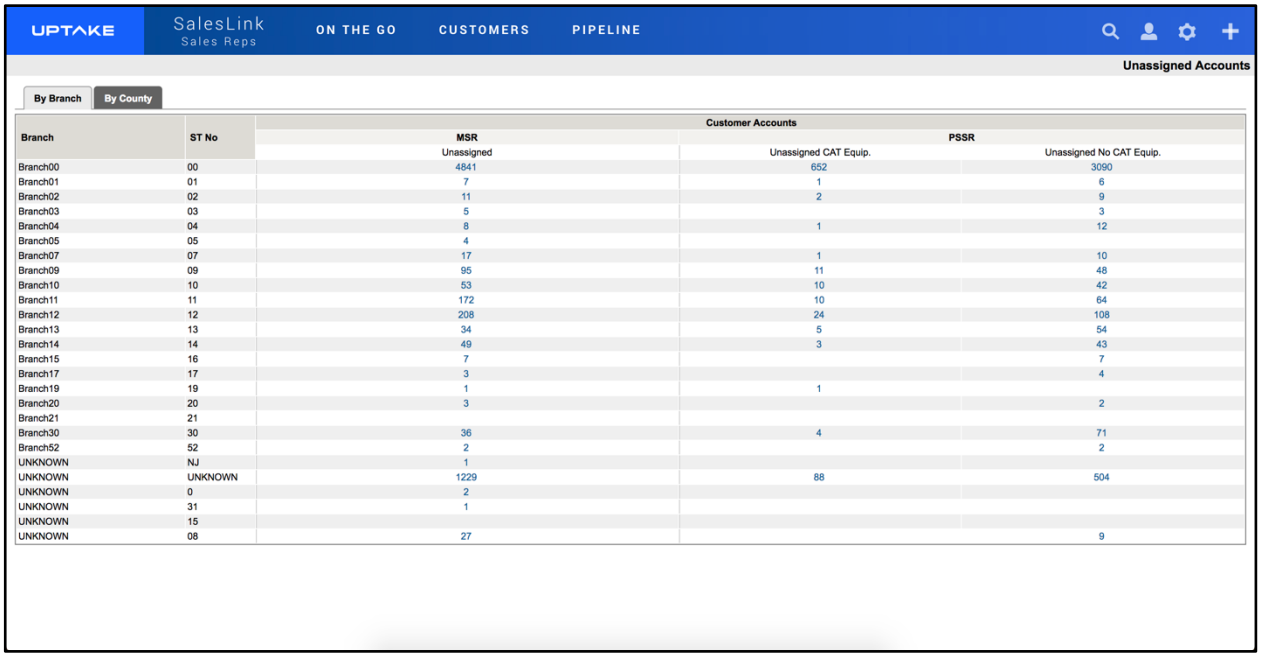
Unassigned Accounts

Click the **Unassigned Accounts** link under CUSTOMERS in the top navigation bar. The Unassigned Accounts page displays.



Branch	ST No	Customer Accounts		
		MSR	PSSR	
		Unassigned	Unassigned CAT Equip.	Unassigned No CAT Equip.
Branch00	00	4841	652	3090
Branch01	01	7	1	6
Branch02	02	11	2	9
Branch03	03	5		3
Branch04	04	8	1	12
Branch05	05	4		
Branch07	07	17	1	10
Branch09	09	95	11	48
Branch10	10	53	10	42
Branch11	11	172	10	64
Branch12	12	208	24	108
Branch13	13	34	5	54
Branch14	14	49	3	43
Branch15	16	7		7
Branch17	17	3		4
Branch19	19	1	1	
Branch20	20	3		2
Branch21	21			
Branch30	30	36	4	71
Branch52	52	2		2
UNKNOWN	NJ	1		
UNKNOWN	UNKNOWN	1229	88	504
UNKNOWN	0	2		
UNKNOWN	31	1		
UNKNOWN	15			
UNKNOWN	08	27		9

This page displays a table of customer accounts that are not currently assigned, organized by MSR and PSSR. Click one of the numbers to view those specific unassigned accounts.

Click on the tabs at the top of the display unassigned accounts by Branch or by County.

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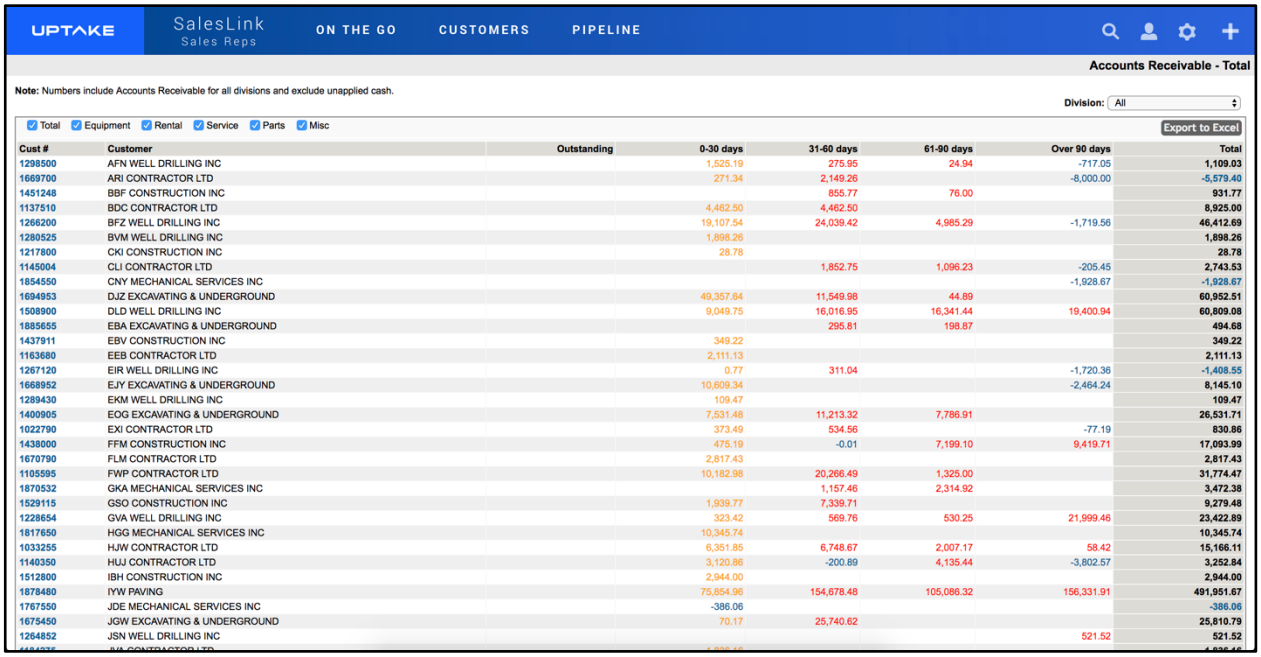
Accounts Receivable

Click the **Accounts Receivable** link under ON THE GO in the top navigation bar. The Accounts Receivable page displays.



Cust #	Customer	Outstanding	0-30 days	31-60 days	61-90 days	Over 90 days	Total
1298500	AFN WELL DRILLING INC		1,525.19	275.95	24.94	-717.05	1,109.03
1669700	ARI CONTRACTOR LTD		271.34	2,149.26		-8,000.00	-5,579.40
1451248	BBF CONSTRUCTION INC			855.77	76.00		931.77
1137510	BDC CONTRACTOR LTD		4,462.50	4,462.50			8,925.00
1266200	BFZ WELL DRILLING INC		19,107.54	24,039.42	4,985.29	-1,719.56	46,412.69
1280525	BVM WELL DRILLING INC		1,898.26				1,898.26
1217800	CKI CONSTRUCTION INC		28.78				28.78
1145004	CLI CONTRACTOR LTD			1,852.75	1,096.23	-205.45	2,743.53
1854550	CNY MECHANICAL SERVICES INC					-1,928.67	-1,928.67
1694953	DJZ EXCAVATING & UNDERGROUND		49,357.64	11,549.98	44.89		60,952.51
1508900	DLD WELL DRILLING INC		9,049.75	16,016.95	16,341.44	19,400.94	60,809.08
1885655	EBA EXCAVATING & UNDERGROUND			295.81	198.87		494.68
1437911	EBV CONSTRUCTION INC		349.22				349.22
1163680	EEB CONTRACTOR LTD		2,111.13				2,111.13
1267120	EIR WELL DRILLING INC		0.77	311.04		-1,720.36	-1,408.55
1668952	EJY EXCAVATING & UNDERGROUND		10,609.34			-2,464.24	8,145.10
1289430	EKM WELL DRILLING INC		109.47				109.47
1400905	EOG EXCAVATING & UNDERGROUND		7,531.48	11,213.32	7,786.91		26,531.71
1022790	EXI CONTRACTOR LTD		373.49	534.56		-77.19	830.86
1438000	FFM CONSTRUCTION INC		475.19	-0.01	7,199.10	9,419.71	17,093.99
1670790	FLM CONTRACTOR LTD		2,817.43				2,817.43
1105595	FWP CONTRACTOR LTD		10,182.98	20,266.49	1,325.00		31,774.47
1870532	GKA MECHANICAL SERVICES INC			1,157.46	2,314.92		3,472.38
1529115	GSO CONSTRUCTION INC		1,939.77	7,339.71			9,279.48
1228654	GVA WELL DRILLING INC		323.42	569.76	530.25	21,999.46	23,422.89
1817650	HGG MECHANICAL SERVICES INC		10,345.74				10,345.74
1033255	HJW CONTRACTOR LTD		6,351.85	6,748.67	2,007.17	58.42	15,166.11
1140350	HUJ CONTRACTOR LTD		3,120.86	-200.89	4,135.44	-3,802.57	3,252.84
1512800	IBH CONSTRUCTION INC		2,944.00				2,944.00
1878480	IYW PAVING		75,854.96	154,678.48	105,086.32	156,331.91	491,951.67
1767550	JDE MECHANICAL SERVICES INC		-386.06				-386.06
1675450	JGW EXCAVATING & UNDERGROUND		70.17	25,740.62			25,810.79
1264852	JSN WELL DRILLING INC					521.52	521.52

This page displays detailed accounts receivable information for all of your customers. Switch divisions by selecting one from the **Divisions** drop-down menu at the top right of the page.

Filter what accounts receivable information is displayed by selecting or deselecting the category checkboxes at the top left of the page. The table will automatically update as each filter selection is made.

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

NOTE: The numbers displayed exclude unapplied cash.

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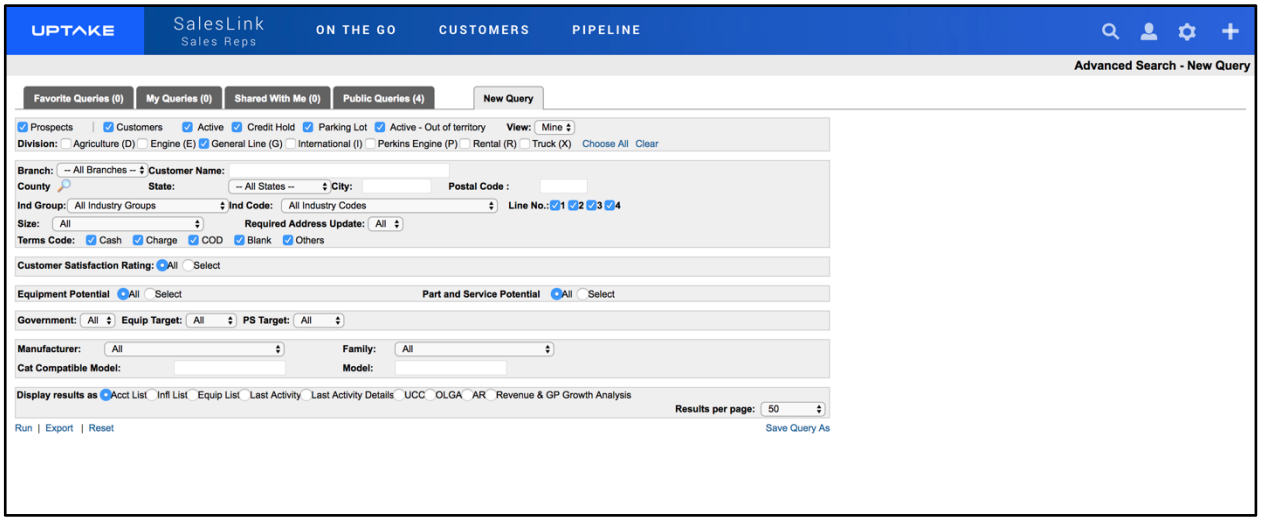
Advanced Search

To run an advanced search for customers or prospects, click the **Advanced Search** link under CUSTOMERS in the top navigation bar. The Advanced Search – New Query page displays.



To run a new query:

1. Select all parameters you want to search by in the New Query form.
2. Select how you want to display your results.
3. Click the **[Run]** button at the bottom left of the page. Your results will display in the manner you selected.
4. Click the **[Reset]** button if you want to return all search parameters to their default settings.

You can also click the **[Export]** button if you want to export your results into an Excel spreadsheet.

To save a query:

1. Click the **[Save Query As]** button at the bottom right of the page.
2. Enter a Name for your query.
3. If you want to share your query, click the **[Change]** button and select users to share with from the list.
4. Click **[Save]**.

Click the tabs at the top of the page to view Favorite Queries, My Queries, Shared With Me, and Public Queries. Click the **[Run]** button to run one of these queries, or **[Export]** to export the results of a query to an Excel spreadsheet.

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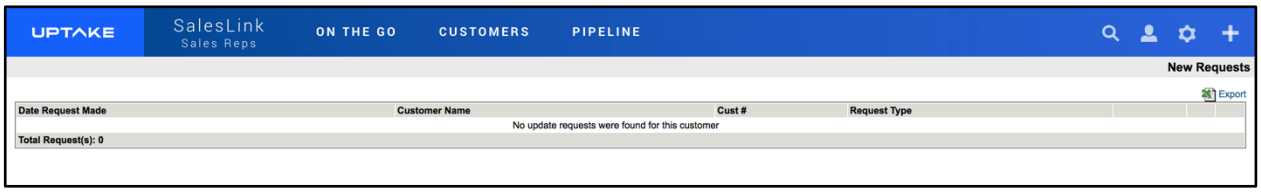
Pending Requests

Requests are changes to a customer's information, including adding equipment, assigning a customer, adding influencers, etc., that are sent to their assigned SalesLink Administrators (or branch administrators or gatekeepers) to make the change in DBS or in SalesLink.

Click the **Pending Requests** link under ON THE GO in the top navigation bar. The New Requests page displays.

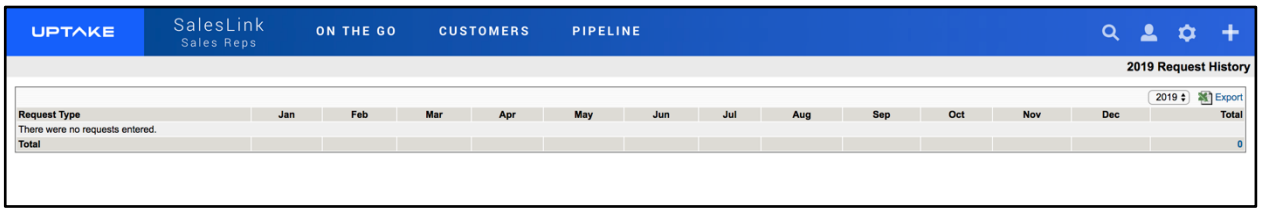


This page displays a table detailing all currently open requests, organized by Date, Customer Name, Customer Number, and Request Type.

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

Request History

Click the **Request History** link under CUSTOMERS in the top navigation bar. The Request History page displays.



This page displays a table of past requests, organized by Request Type and Month. Use the Year drop-down menu at the top of the table to switch the year the table displays.

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

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Issues

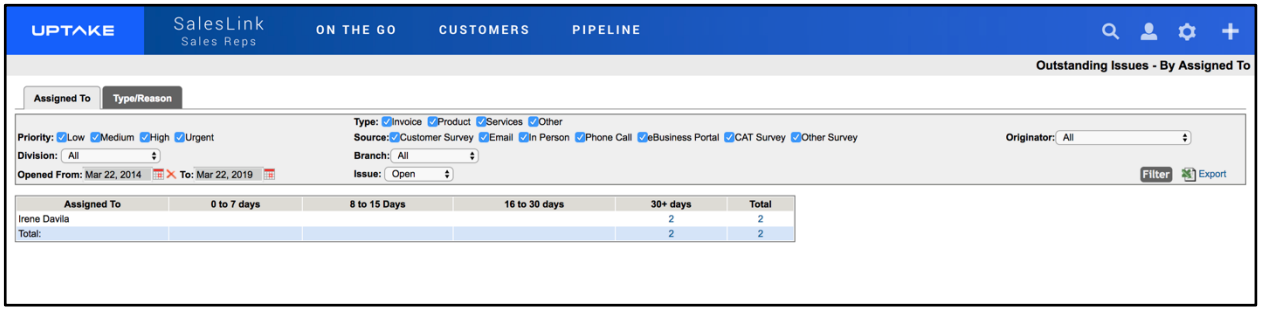
Add New Issue

To add a new issue:

1. Click the Plus icon at the far right of the top navigation bar.
2. Select **[Add New Issue]** from the drop-down menu.
3. Enter all required information regarding the customer and issue details into the Add New Issue form.
4. Click **[Save]** to create the new issue.

My Customer's Issues

Click the **My Customer's Issues** link under ON THE GO in the top navigation bar. The Outstanding Issues page displays.



This page displays a detailed table of all your currently outstanding customer issues. Use the tabs at the top of the page to organize the issues by Assigned To or Type/Reason.

To filter the table:

1. Select the fields you want to filter by at the top of the page.
2. Select a date range to filter by.
3. Click the **[Filter]** button.

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

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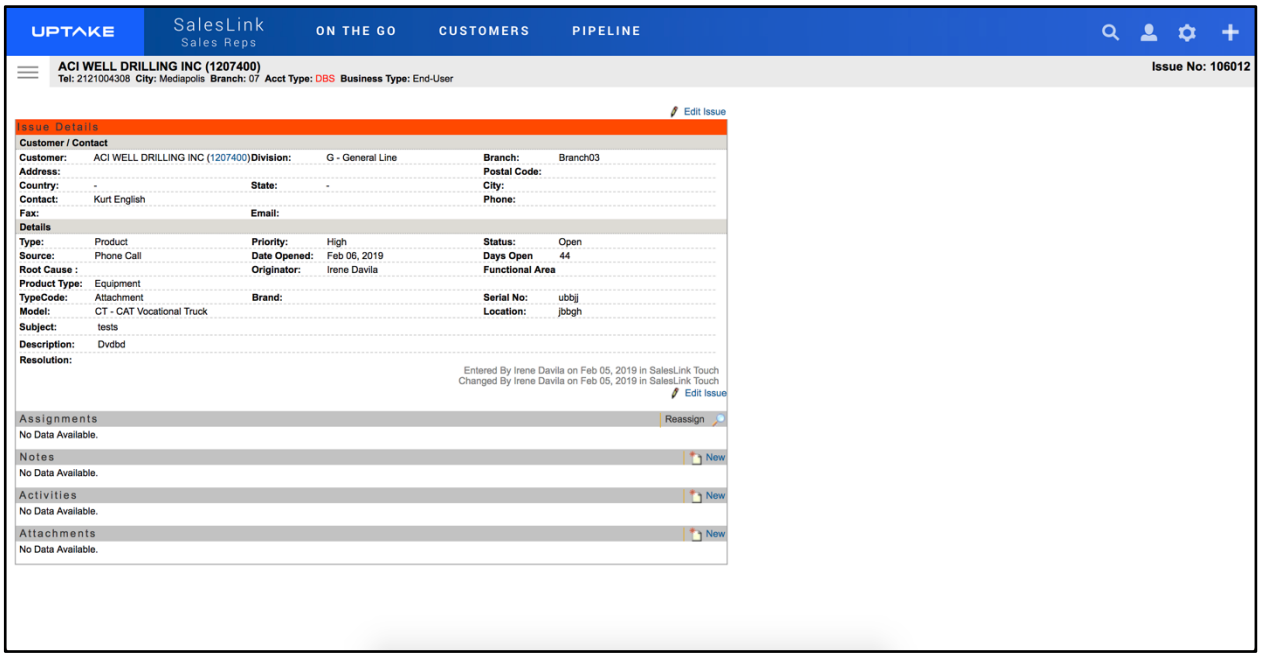
Issue Details

Click on an Issue Number to view its Issue Details page.



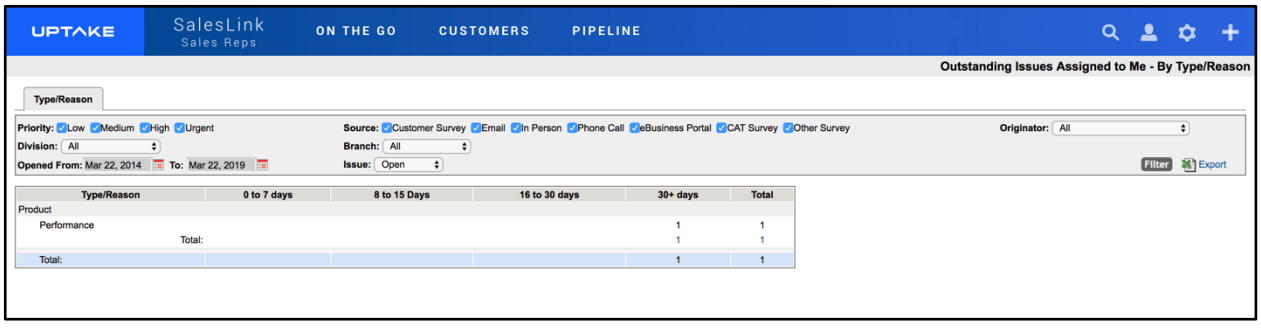
This page displays in-depth information regarding the customer, details about the specific issue, actions taken, etc. Click the **[Edit Issue]** button to edit information about the issue.

Click on the magnifying glass icon to search for a user to assign to the issue.

Click on the **[New]** buttons to add any Notes, Activities, or Attachments to the issue.

Issues Assigned to Me

Click the **Issues Assigned to Me** link under ON THE GO in the top navigation bar. The Outstanding Issues Assigned to Me page displays.



This page displays a detailed table of all the currently outstanding issues that are assigned to you, organized by Type/Reason.

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To filter the table:

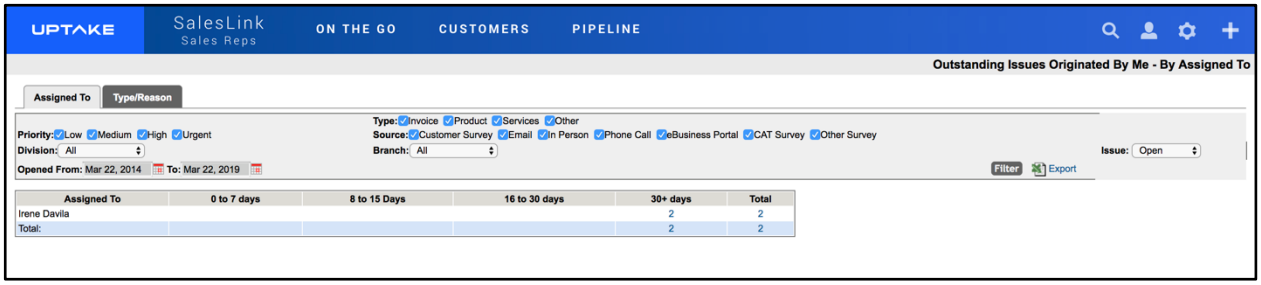
1. Select the fields you want to filter by at the top of the page.
2. Select a date range to filter by.
3. Click the **[Filter]** button.

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

Click on an issue to view its Issue Details.

Issues Originated by Me

Click the **Issues Originated by Me** link under ON THE GO in the top navigation bar. The Outstanding Issues Originated by Me page displays.



This page displays a detailed table of all currently outstanding customer issues that were created by you. Use the tabs at the top of the page to organize the issues by Assigned To or Type/Reason.

To filter the table:

1. Select the fields you want to filter by at the top of the page.
2. Select a date range to filter by.
3. Click the **[Filter]** button.

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

Click on an issue to view its Issue Details.

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Competitors

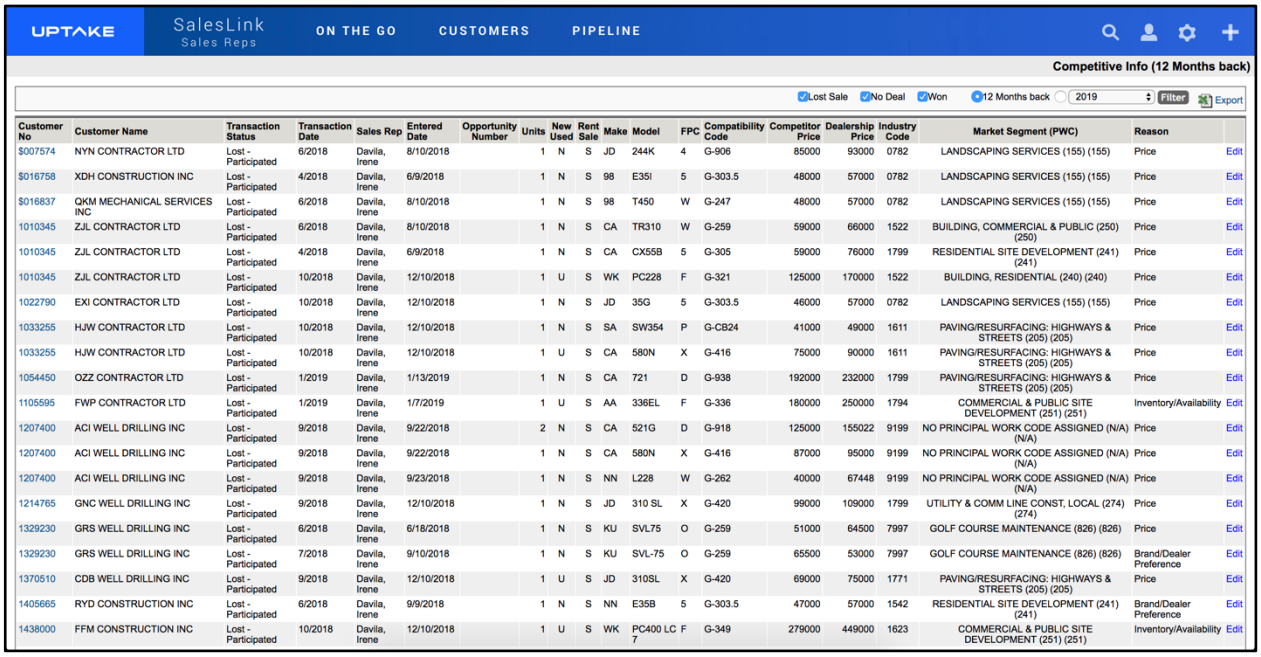
Add COMPARE Report

To add a new Compare Report:

1. Click the Plus icon at the far right of the top navigation bar.
2. Select **[Add COMPARE Report]** from the drop-down menu.
3. Click the magnifying glass icon and search for a customer.
4. Select a division for the customer you want to compare.
5. Enter the information and any comments into the Add New Compare form.
6. Click the **[Add Compare]** button to create the Compare Report.

My Competitive Info (All Customers)

Click the **My Competitive Info (All Customers)** link under CUSTOMERS in the top navigation bar. The Competitive Info page displays.



Customer No	Customer Name	Transaction Status	Transaction Date	Sales Rep	Entered Date	Opportunity Number	Units	New Used	Rent Sale	Make	Model	FPC	Compatibility Code	Competitor Price	Dealership Price	Industry Code	Market Segment (PWC)	Reason	
$007574	NYN CONTRACTOR LTD	Lost - Participated	6/2018	Davila, Irene	8/10/2018		1	N	S	JD	244K	4	G-906	85000	93000	0782	LANDSCAPING SERVICES (155) (155)	Price	Edit
$016758	XDH CONSTRUCTION INC	Lost - Participated	4/2018	Davila, Irene	6/9/2018		1	N	S	98	E35I	5	G-303.5	48000	57000	0782	LANDSCAPING SERVICES (155) (155)	Price	Edit
$016837	QKM MECHANICAL SERVICES INC	Lost - Participated	6/2018	Davila, Irene	8/10/2018		1	N	S	98	T450	W	G-247	48000	57000	0782	LANDSCAPING SERVICES (155) (155)	Price	Edit
1010345	ZJL CONTRACTOR LTD	Lost - Participated	6/2018	Davila, Irene	8/10/2018		1	N	S	CA	TR310	W	G-259	59000	66000	1522	BUILDING, COMMERCIAL & PUBLIC (250) (250)	Price	Edit
1010345	ZJL CONTRACTOR LTD	Lost - Participated	4/2018	Davila, Irene	6/9/2018		1	N	S	CA	CX55B	5	G-305	59000	76000	1799	RESIDENTIAL SITE DEVELOPMENT (241) (241)	Price	Edit
1010345	ZJL CONTRACTOR LTD	Lost - Participated	10/2018	Davila, Irene	12/10/2018		1	U	S	WK	PC228	F	G-321	125000	170000	1522	BUILDING, RESIDENTIAL (240) (240)	Price	Edit
1022790	EXI CONTRACTOR LTD	Lost - Participated	10/2018	Davila, Irene	12/10/2018		1	N	S	JD	35G	5	G-303.5	46000	57000	0782	LANDSCAPING SERVICES (155) (155)	Price	Edit
1033255	HJW CONTRACTOR LTD	Lost - Participated	10/2018	Davila, Irene	12/10/2018		1	N	S	SA	SW354	P	G-CB24	41000	49000	1611	PAVING/RESURFACING: HIGHWAYS & STREETS (205) (205)	Price	Edit
1033255	HJW CONTRACTOR LTD	Lost - Participated	10/2018	Davila, Irene	12/10/2018		1	U	S	CA	580N	X	G-416	75000	90000	1611	PAVING/RESURFACING: HIGHWAYS & STREETS (205) (205)	Price	Edit
1054450	OZZ CONTRACTOR LTD	Lost - Participated	1/2019	Davila, Irene	1/13/2019		1	N	S	CA	721	D	G-938	192000	232000	1799	PAVING/RESURFACING: HIGHWAYS & STREETS (205) (205)	Price	Edit
1105595	FWP CONTRACTOR LTD	Lost - Participated	1/2019	Davila, Irene	1/7/2019		1	U	S	AA	336EL	F	G-336	180000	250000	1794	COMMERCIAL & PUBLIC SITE DEVELOPMENT (251) (251)	Inventory/Availability	Edit
1207400	ACI WELL DRILLING INC	Lost - Participated	9/2018	Davila, Irene	9/22/2018		2	N	S	CA	521G	D	G-918	125000	155022	9199	NO PRINCIPAL WORK CODE ASSIGNED (N/A) (N/A)	Price	Edit
1207400	ACI WELL DRILLING INC	Lost - Participated	9/2018	Davila, Irene	9/22/2018		1	N	S	CA	580N	X	G-416	87000	95000	9199	NO PRINCIPAL WORK CODE ASSIGNED (N/A) (N/A)	Price	Edit
1207400	ACI WELL DRILLING INC	Lost - Participated	9/2018	Davila, Irene	9/23/2018		1	N	S	NN	L228	W	G-262	40000	67448	9199	NO PRINCIPAL WORK CODE ASSIGNED (N/A) (N/A)	Price	Edit
1214765	GNC WELL DRILLING INC	Lost - Participated	9/2018	Davila, Irene	12/10/2018		1	N	S	JD	310 SL	X	G-420	99000	109000	1799	UTILITY & COMM LINE CONST, LOCAL (274) (274)	Price	Edit
1329230	GRS WELL DRILLING INC	Lost - Participated	6/2018	Davila, Irene	6/18/2018		1	N	S	KU	SVL75	O	G-259	51000	64500	7997	GOLF COURSE MAINTENANCE (826) (826)	Price	Edit
1329230	GRS WELL DRILLING INC	Lost - Participated	7/2018	Davila, Irene	9/10/2018		1	N	S	KU	SVL-75	O	G-259	65500	53000	7997	GOLF COURSE MAINTENANCE (826) (826)	Brand/Dealer Preference	Edit
1370510	CDB WELL DRILLING INC	Lost - Participated	9/2018	Davila, Irene	12/10/2018		1	U	S	JD	310SL	X	G-420	69000	75000	1771	PAVING/RESURFACING: HIGHWAYS & STREETS (205) (205)	Price	Edit
1405665	RYD CONSTRUCTION INC	Lost - Participated	6/2018	Davila, Irene	9/9/2018		1	N	S	NN	E35B	5	G-303.5	47000	57000	1542	RESIDENTIAL SITE DEVELOPMENT (241) (241)	Brand/Dealer Preference	Edit
1438000	FFM CONSTRUCTION INC	Lost - Participated	10/2018	Davila, Irene	12/10/2018		1	U	S	WK	PC400 LC 7	F	G-349	279000	449000	1623	COMMERCIAL & PUBLIC SITE DEVELOPMENT (251) (251)	Inventory/Availability	Edit

This page displays a detailed table of information regarding competitors for each of your customers, going as far back as 12 months.

To filter the table:

1. Select the categories to filter by using the checkboxes at the top of the page.
2. Select a year using the **Year** drop-down menu.
3. Click the **[Filter]** button.

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

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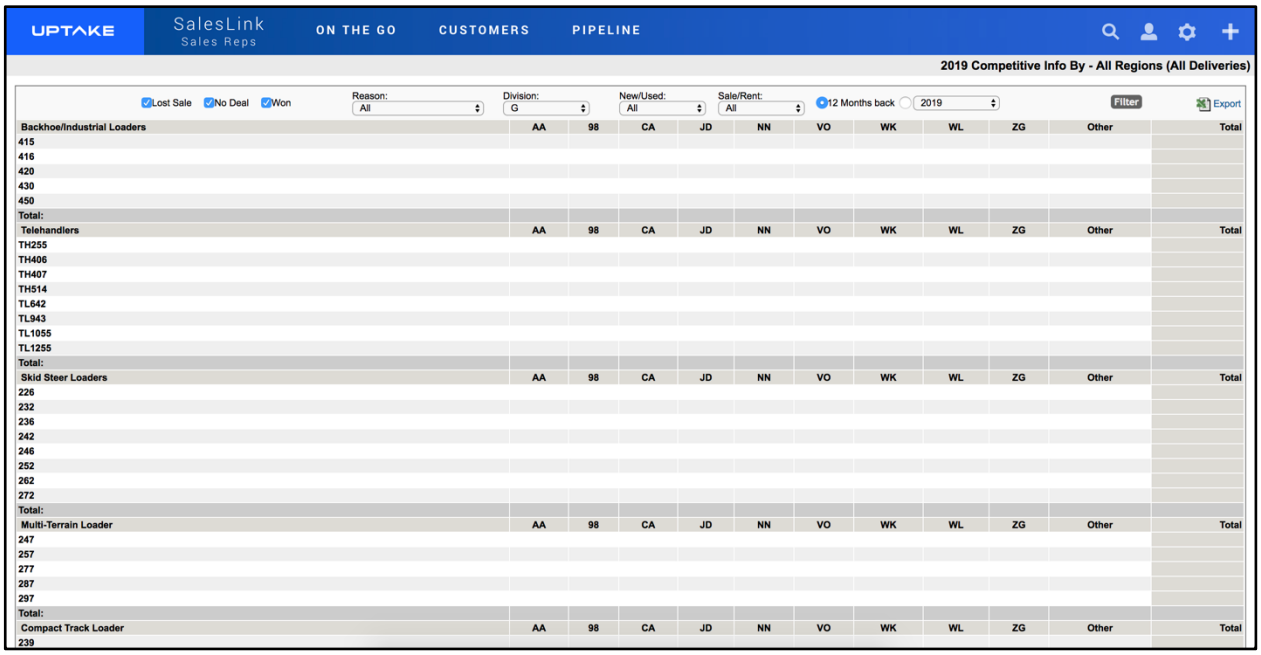
Click the **[Edit]** button to edit competitive information for a customer if a sale is lost to a competitor. Make any changes in the Lost Sales page and click **[Save]**.

All Competitive Info (All Models & Reps)

Click the **All Competitive Info (All Models & Reps)** link under CUSTOMERS in the top navigation bar. The Yearly Competitive Info page displays.



This page displays a detailed table of all competitive information over the past year for all regions, organized by equipment type.

To filter the table:

1. Select the fields to filter by at the top of the page.
2. Select a year using the **Year** drop-down menu.
3. Click the **[Filter]** button.

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

Click on a number in the table to view details regarding that competitive info.

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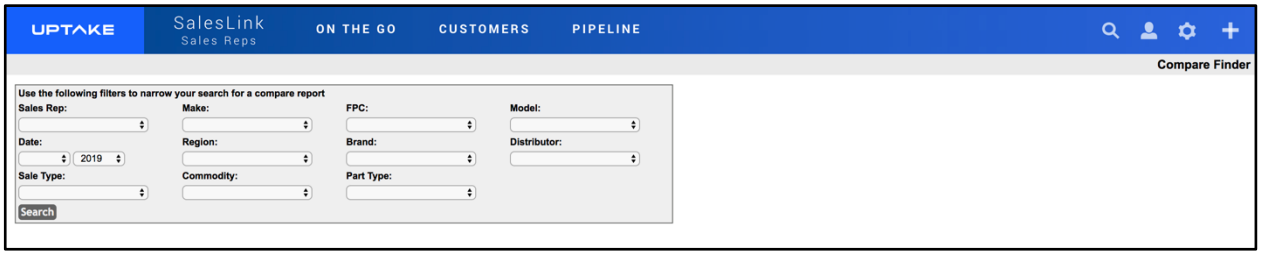
COMPARE Report Finder

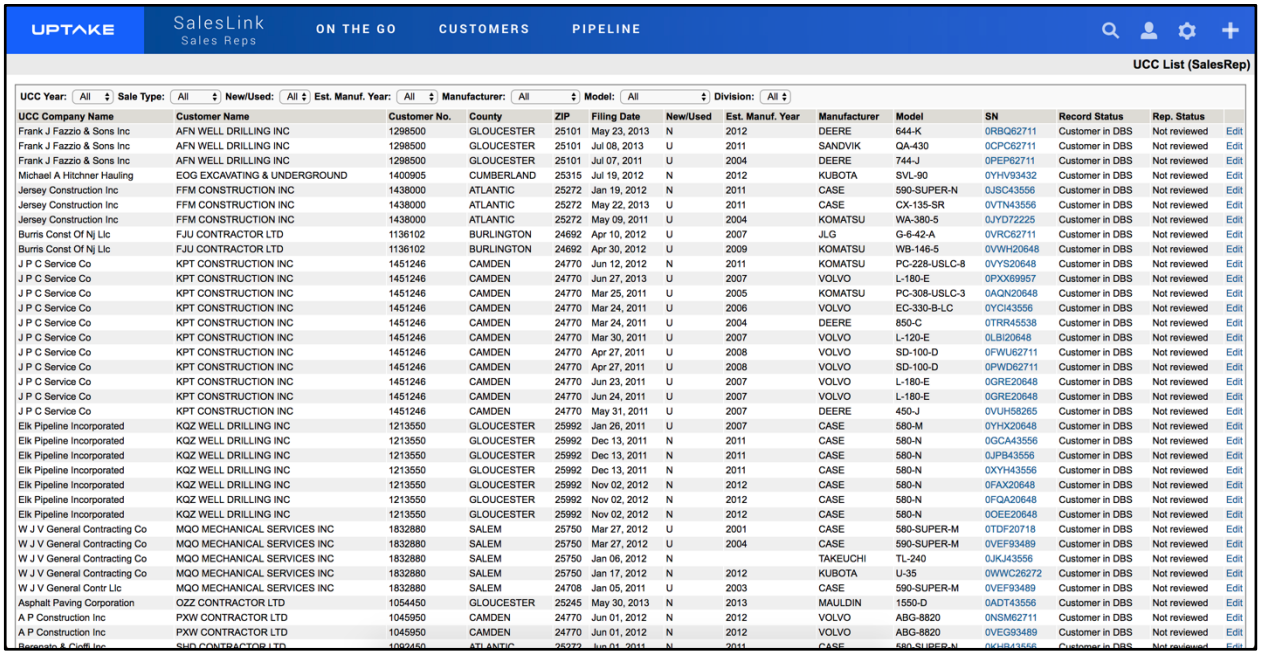
Click the **COMPARE Report Finder** link under CUSTOMERS in the top navigation bar. The Compare Finder page displays.



Use the drop-down menus to search through all Compare Reports. Select the fields you want to search by, then click the **[Search]** button to display a list of Compare Reports matching your request.

Open UCC

Click the **Open UCC** link under CUSTOMERS in the top navigation bar. The UCC List page displays.



This page displays a detailed table of all UCCs, organized by Customer Name. Use the drop-down menus at the top of the page to filter the table. The table will automatically update as each filter selection is made.

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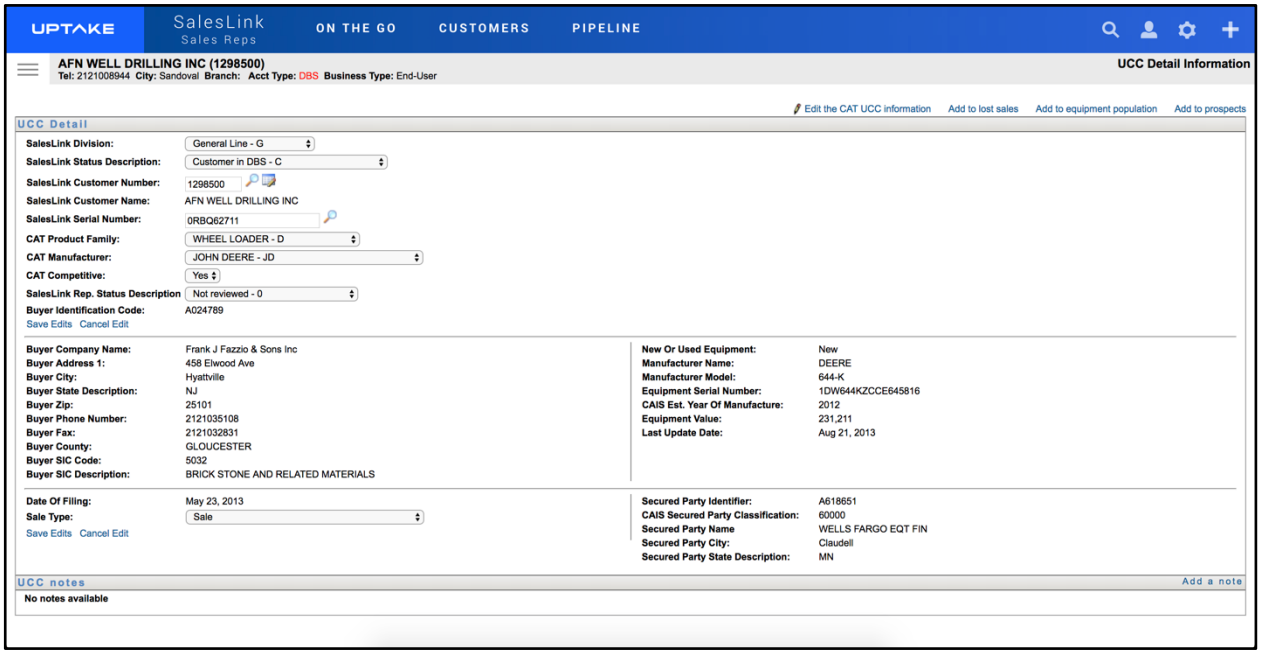
UCC Detail Page

Click the **[Edit]** button to edit the UCC details. The UCC Detail Information page displays.



Make all necessary edits to the UCC Details and add any notes by clicking the **[Add a Note]** button, then click **[Save Edits]**.

Use the buttons at the top of the page to add the UCC to Lost Sales, Equipment Population, or Prospects.

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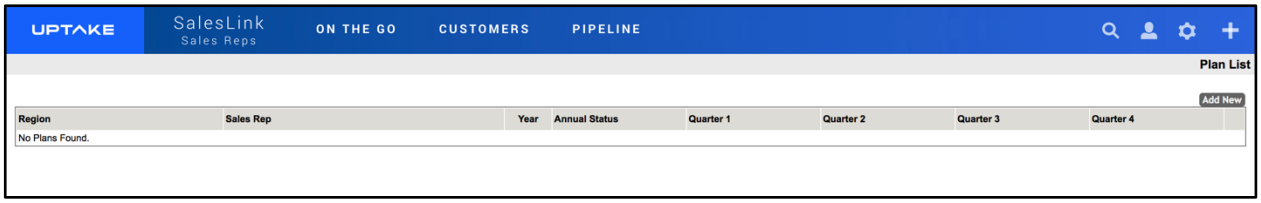
Plans

Territory Plans

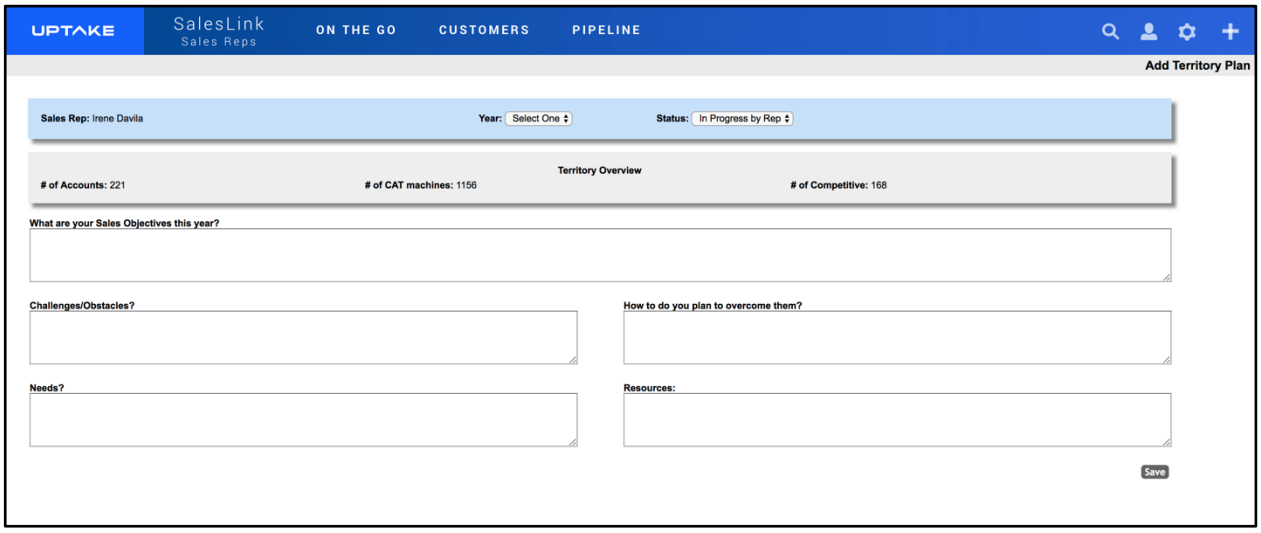
Click the **Territory Plans** link under CUSTOMERS in the top navigation bar. The Plan List page displays.



This page displays a detailed table of all current territory plans organized by region. Click on a plan to view its details.

Add New Plan

From the Plan List page, click the **[Add New]** button. The Add Territory Plan page displays.



To add a new territory plan, fill in each of the fields in the Add Territory Plan form. Then click the **[Save]** button. The plan will be added to your Plan List page.

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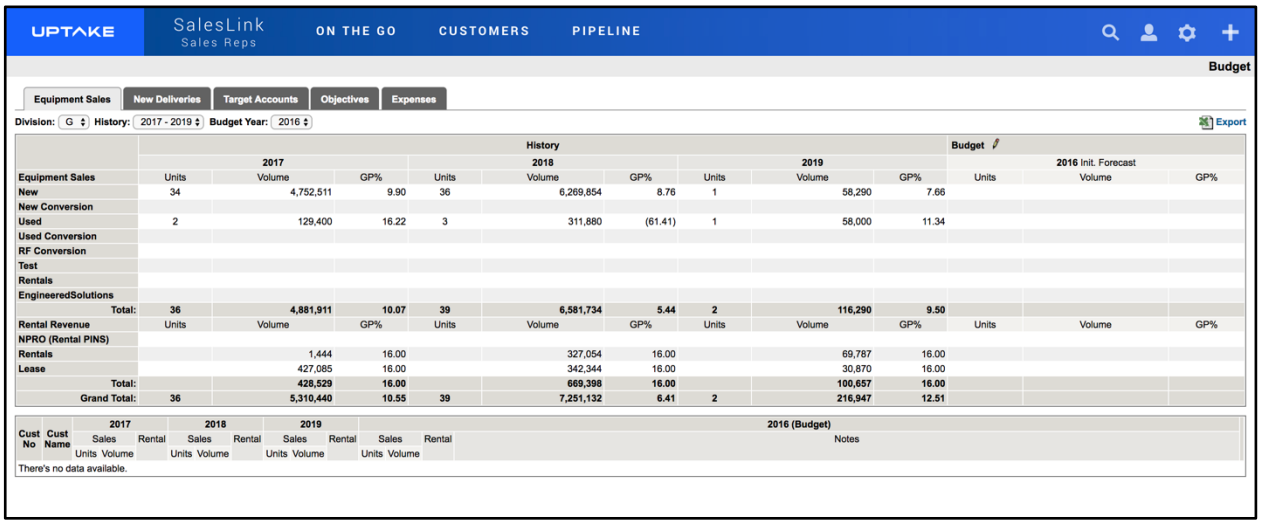
Budget

Click the **Budget** link under CUSTOMERS in the top navigation bar. The Budget page displays.



This page displays detailed information regarding the current and historical budget by division. Use the drop-down menus at the top of the page to switch divisions and years displayed.

Use the tabs at the top of the page to view reports for Equipment Sales, New Deliveries, Target Accounts, Objectives, and Expenses.

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

To edit budget details:

1. Click the Pencil icon next to Budget.
2. Enter all necessary information into the fields.
3. Click **[Update Budget]**.

To update target accounts:

1. Use the Target drop-down menus to change the target status.
2. Click **[Update]**.
3. Enter any information into the Plan or Action fields.
4. Click **[Update]**.

To add a new objective:

1. Click the **[Add New Objective]** button.
2. Enter the objective details into the Add Objective form.
3. Click **[Submit]**.

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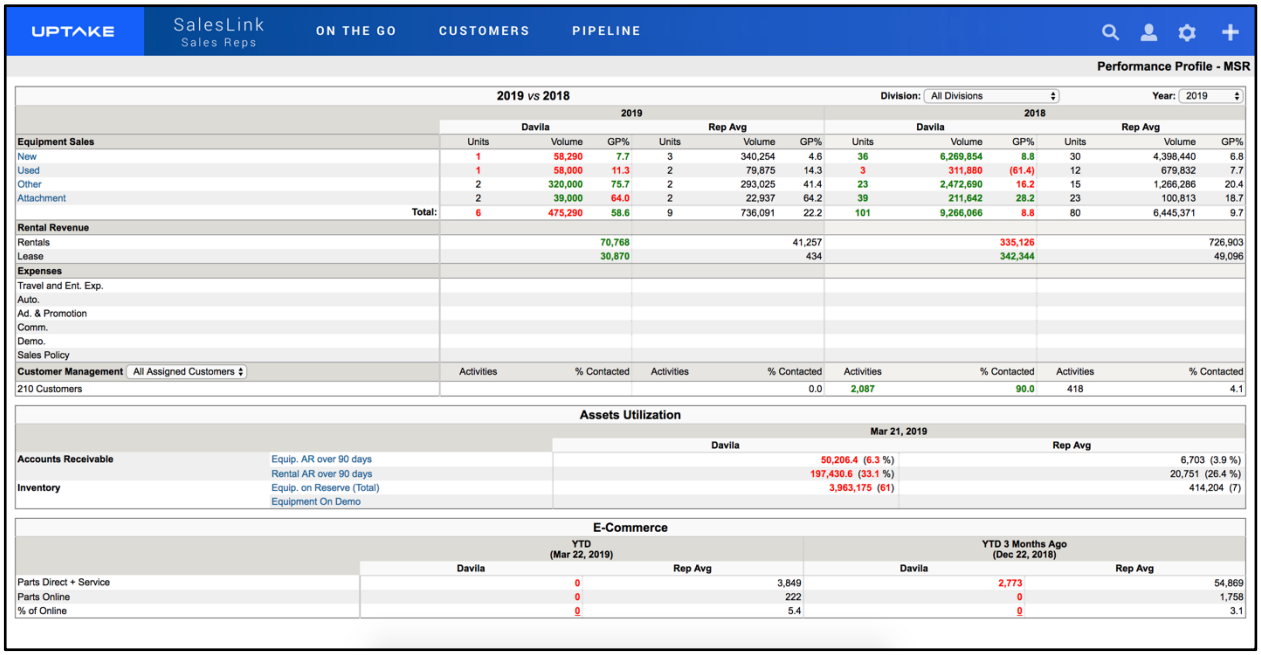
Sales

Performance Profile

Click the **Performance Profile** link under PIPELINE in the top navigation bar. The Performance Profile page displays.



This page displays a detailed table of your sales information for the current and past year. The numbers appearing in green and red are being compared to the average of all of the other sales reps. Green represents above-average performance, red represents under-average performance. A number in Black means that it matches the average exactly.

Use the drop-down menus at the top of the page to change the Division and Year of information displayed in the table.

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

Add Lost Sales

To add a lost sale:

1. Click the Plus icon at the far right of the top navigation bar.
2. Select **[Add Lost Sales]** from the drop-down menu.
3. Click the magnifying glass icon and search for a customer.
4. Select a division for the customer.
5. Enter all required information into the Lost Sales form.
6. Click the **[Save]** button to enter the lost sale.

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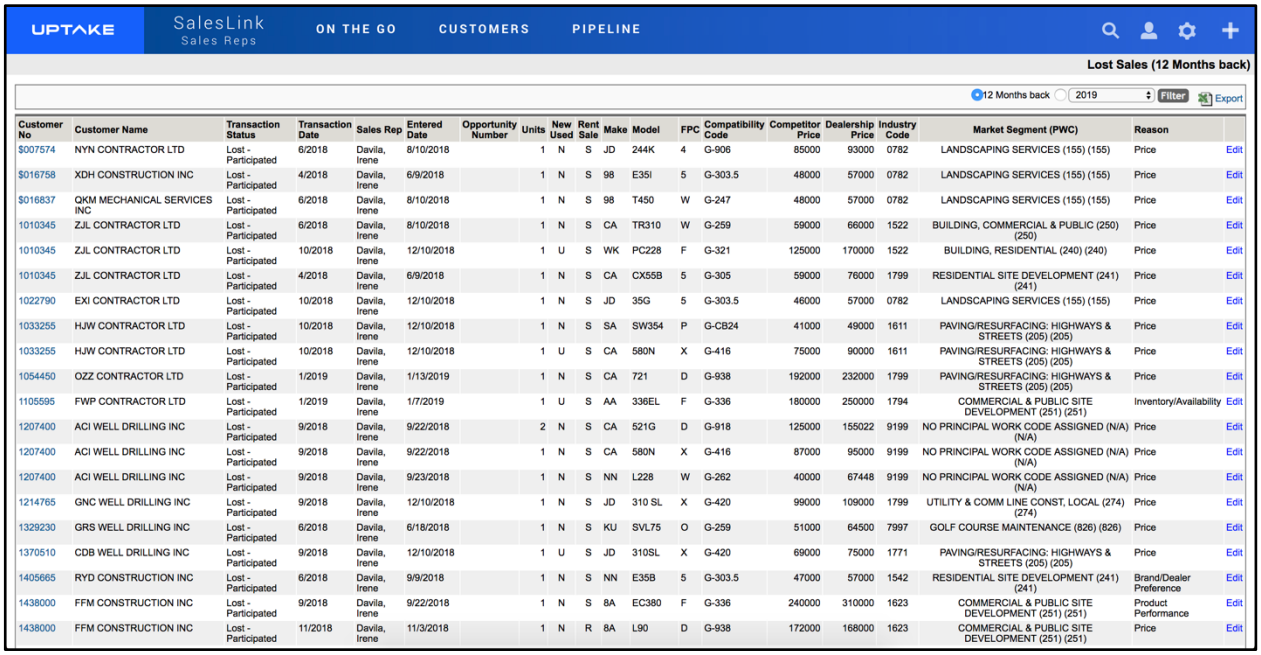
My Lost Sales (All Customers)

Click the **My Lost Sales (All Customers)** link under PIPELINE in the top navigation bar. The Lost Sales page displays.



Customer No	Customer Name	Transaction Status	Transaction Date	Sales Rep	Entered Date	Opportunity Number	Units	New Used	Rent Sale	Make	Model	FPC	Compatibility Code	Competitor Price	Dealership Price	Industry Code	Market Segment (PWC)	Reason	
$007574	NYN CONTRACTOR LTD	Lost - Participated	6/2018	Davila, Irene	8/10/2018		1	N	S	JD	244K	4	G-906	85000	93000	0782	LANDSCAPING SERVICES (155) (155)	Price	Edit
$016758	XDH CONSTRUCTION INC	Lost - Participated	4/2018	Davila, Irene	6/9/2018		1	N	S	98	E35I	5	G-303.5	48000	57000	0782	LANDSCAPING SERVICES (155) (155)	Price	Edit
$016837	QKM MECHANICAL SERVICES INC	Lost - Participated	6/2018	Davila, Irene	8/10/2018		1	N	S	98	T450	W	G-247	48000	57000	0782	LANDSCAPING SERVICES (155) (155)	Price	Edit
1010345	ZJL CONTRACTOR LTD	Lost - Participated	6/2018	Davila, Irene	8/10/2018		1	N	S	CA	TR310	W	G-259	59000	66000	1522	BUILDING, COMMERCIAL & PUBLIC (250) (250)	Price	Edit
1010345	ZJL CONTRACTOR LTD	Lost - Participated	10/2018	Davila, Irene	12/10/2018		1	U	S	WK	PC228	F	G-321	125000	170000	1522	BUILDING, RESIDENTIAL (240) (240)	Price	Edit
1010345	ZJL CONTRACTOR LTD	Lost - Participated	4/2018	Davila, Irene	6/9/2018		1	N	S	CA	CX55B	5	G-305	59000	76000	1799	RESIDENTIAL SITE DEVELOPMENT (241) (241)	Price	Edit
1022790	EXI CONTRACTOR LTD	Lost - Participated	10/2018	Davila, Irene	12/10/2018		1	N	S	JD	35G	5	G-303.5	46000	57000	0782	LANDSCAPING SERVICES (155) (155)	Price	Edit
1033255	HJW CONTRACTOR LTD	Lost - Participated	10/2018	Davila, Irene	12/10/2018		1	N	S	SA	SW354	P	G-CB24	41000	49000	1611	PAVING/RESURFACING: HIGHWAYS & STREETS (205) (205)	Price	Edit
1033255	HJW CONTRACTOR LTD	Lost - Participated	10/2018	Davila, Irene	12/10/2018		1	U	S	CA	580N	X	G-416	75000	90000	1611	PAVING/RESURFACING: HIGHWAYS & STREETS (205) (205)	Price	Edit
1054450	OZZ CONTRACTOR LTD	Lost - Participated	1/2019	Davila, Irene	1/13/2019		1	N	S	CA	721	D	G-938	192000	232000	1799	PAVING/RESURFACING: HIGHWAYS & STREETS (205) (205)	Price	Edit
1105595	FWP CONTRACTOR LTD	Lost - Participated	1/2019	Davila, Irene	1/7/2019		1	U	S	AA	336EL	F	G-336	180000	250000	1794	COMMERCIAL & PUBLIC SITE DEVELOPMENT (251) (251)	Inventory/Availability	Edit
1207400	ACI WELL DRILLING INC	Lost - Participated	9/2018	Davila, Irene	9/22/2018		2	N	S	CA	521G	D	G-918	125000	155022	9199	NO PRINCIPAL WORK CODE ASSIGNED (N/A) (N/A)	Price	Edit
1207400	ACI WELL DRILLING INC	Lost - Participated	9/2018	Davila, Irene	9/22/2018		1	N	S	CA	580N	X	G-416	87000	95000	9199	NO PRINCIPAL WORK CODE ASSIGNED (N/A) (N/A)	Price	Edit
1207400	ACI WELL DRILLING INC	Lost - Participated	9/2018	Davila, Irene	9/23/2018		1	N	S	NN	L228	W	G-262	40000	67448	9199	NO PRINCIPAL WORK CODE ASSIGNED (N/A) (N/A)	Price	Edit
1214765	GNC WELL DRILLING INC	Lost - Participated	9/2018	Davila, Irene	12/10/2018		1	N	S	JD	310 SL	X	G-420	99000	109000	1799	UTILITY & COMM LINE CONST, LOCAL (274) (274)	Price	Edit
1329230	GRS WELL DRILLING INC	Lost - Participated	6/2018	Davila, Irene	6/18/2018		1	N	S	KU	SVL75	O	G-259	51000	64500	7997	GOLF COURSE MAINTENANCE (826) (826)	Price	Edit
1370510	CDB WELL DRILLING INC	Lost - Participated	9/2018	Davila, Irene	12/10/2018		1	U	S	JD	310SL	X	G-420	69000	75000	1771	PAVING/RESURFACING: HIGHWAYS & STREETS (205) (205)	Price	Edit
1405665	RYD CONSTRUCTION INC	Lost - Participated	6/2018	Davila, Irene	9/9/2018		1	N	S	NN	E35B	5	G-303.5	47000	57000	1542	RESIDENTIAL SITE DEVELOPMENT (241) (241)	Brand/Dealer Preference	Edit
1438000	FFM CONSTRUCTION INC	Lost - Participated	9/2018	Davila, Irene	9/22/2018		1	N	S	8A	EC380	F	G-336	240000	310000	1623	COMMERCIAL & PUBLIC SITE DEVELOPMENT (251) (251)	Product Performance	Edit
1438000	FFM CONSTRUCTION INC	Lost - Participated	11/2018	Davila, Irene	11/3/2018		1	N	R	8A	L90	D	G-938	172000	168000	1623	COMMERCIAL & PUBLIC SITE DEVELOPMENT (251) (251)	Price	Edit

This page displays a detailed table of all sales you lost over the past 12 months. Switch the year of lost sales displayed in the table by selecting a year from the drop-down menu at the top of the page, then click **[Filter]**.

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

To edit a lost sale:

1. Click the **[Edit]** button next to the lost sale you want to edit.
2. Edit any information in the Lost Sale form.
3. Click **[Save]** to save the edits, or **[Delete]** to delete the lost sale.

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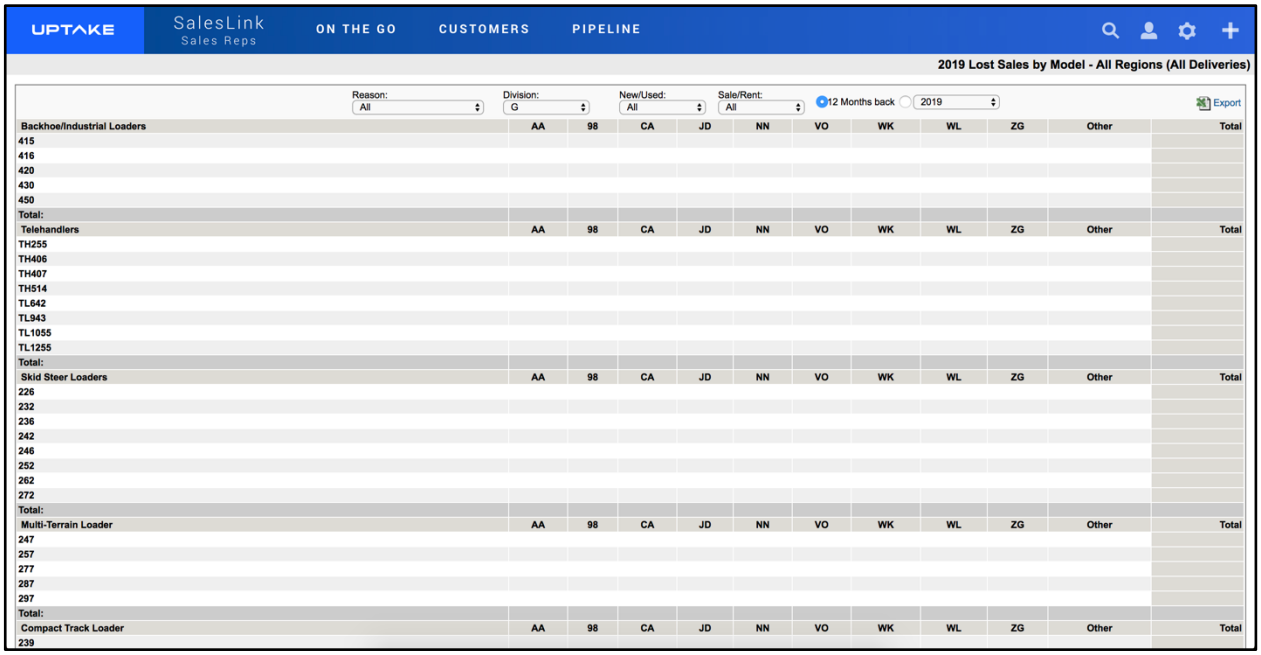
All Lost Sales (All Models and Reps)

Click the **All Lost Sales (All Models and Reps)** link under PIPELINE in the top navigation bar. The Lost Sales by Model – All Regions page displays.



This page displays a detailed table of all lost sales, organized by equipment model. Use the drop-down menus at the top of the page to filter the table. The table will automatically update as each filter selection is made.

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

Click on a number in the table to view details regarding the lost sale(s).

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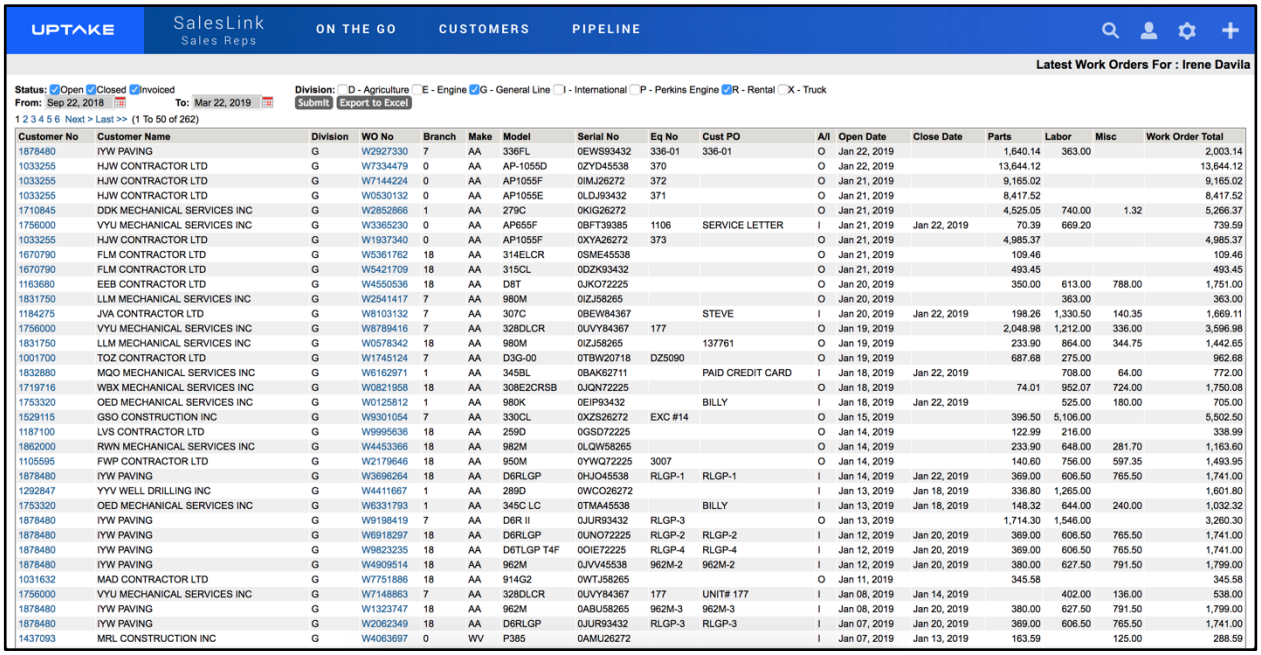
Latest Work Orders

Click the **Latest Work Orders** link under PIPELINE in the top navigation bar. The Latest Work Orders page displays.



Customer No	Customer Name	Division	WO No	Branch	Make	Model	Serial No	Eq No	Cust PO	A/I	Open Date	Close Date	Parts	Labor	Misc	Work Order Total
1878480	IYW PAVING	G	W2927330	7	AA	336FL	0EWS93432	336-01	336-01	O	Jan 22, 2019		1,640.14	363.00		2,003.14
1033255	HJW CONTRACTOR LTD	G	W7334479	0	AA	AP-1055D	0ZYD45538	370		O	Jan 22, 2019		13,644.12			13,644.12
1033255	HJW CONTRACTOR LTD	G	W7144224	0	AA	AP1055F	0IMJ26272	372		O	Jan 21, 2019		9,165.02			9,165.02
1033255	HJW CONTRACTOR LTD	G	W0530132	0	AA	AP1055E	0LDJ93432	371		O	Jan 21, 2019		8,417.52			8,417.52
1710845	DDK MECHANICAL SERVICES INC	G	W2852866	1	AA	279C	0KIG26272			O	Jan 21, 2019		4,525.05	740.00	1.32	5,266.37
1756000	VYU MECHANICAL SERVICES INC	G	W3365230	0	AA	AP655F	0BFT39385	1106	SERVICE LETTER	I	Jan 21, 2019	Jan 22, 2019	70.39	669.20		739.59
1033255	HJW CONTRACTOR LTD	G	W1937340	0	AA	AP1055F	0XYA26272	373		O	Jan 21, 2019		4,985.37			4,985.37
1670790	FLM CONTRACTOR LTD	G	W5361762	18	AA	314ELCR	0SME45538			O	Jan 21, 2019		109.46			109.46
1670790	FLM CONTRACTOR LTD	G	W5421709	18	AA	315CL	0DZK93432			O	Jan 21, 2019		493.45			493.45
1163680	EEB CONTRACTOR LTD	G	W4550536	18	AA	D8T	0JKO72225			O	Jan 20, 2019		350.00	613.00	788.00	1,751.00
1831750	LLM MECHANICAL SERVICES INC	G	W2541417	7	AA	980M	0IZJ58265			O	Jan 20, 2019			363.00		363.00
1184275	JVA CONTRACTOR LTD	G	W8103132	7	AA	307C	0BEW84367		STEVE	I	Jan 20, 2019	Jan 22, 2019	198.26	1,330.50	140.35	1,669.11
1756000	VYU MECHANICAL SERVICES INC	G	W8789416	7	AA	328DLCR	0UVY84367	177		O	Jan 19, 2019		2,048.98	1,212.00	336.00	3,596.98
1831750	LLM MECHANICAL SERVICES INC	G	W0578342	18	AA	980M	0IZJ58265		137761	O	Jan 19, 2019		233.90	864.00	344.75	1,442.65
1001700	TOZ CONTRACTOR LTD	G	W1745124	7	AA	D3G-00	0TBW20718	DZ5090		O	Jan 19, 2019		687.68	275.00		962.68
1832880	MQO MECHANICAL SERVICES INC	G	W6162971	1	AA	345BL	0BAK62711		PAID CREDIT CARD	I	Jan 18, 2019	Jan 22, 2019		708.00	64.00	772.00
1719716	WBX MECHANICAL SERVICES INC	G	W0821958	18	AA	308E2CRSB	0JQN72225			O	Jan 18, 2019		74.01	952.07	724.00	1,750.08
1753320	OED MECHANICAL SERVICES INC	G	W0125812	1	AA	980K	0EIP93432		BILLY	I	Jan 18, 2019	Jan 22, 2019		525.00	180.00	705.00
1529115	GSO CONSTRUCTION INC	G	W9301054	7	AA	330CL	0XZS26272	EXC #14		O	Jan 15, 2019		396.50	5,106.00		5,502.50
1187100	LVS CONTRACTOR LTD	G	W9995636	18	AA	259D	0GSD72225			O	Jan 14, 2019		122.99	216.00		338.99
1862000	RWN MECHANICAL SERVICES INC	G	W4453366	18	AA	982M	0LQW58265			O	Jan 14, 2019		233.90	648.00	281.70	1,163.60
1105595	FWP CONTRACTOR LTD	G	W2179646	18	AA	950M	0YWQ72225	3007		O	Jan 14, 2019		140.60	756.00	597.35	1,493.95
1878480	IYW PAVING	G	W3696264	18	AA	D6RLGP	0HJO45538	RLGP-1	RLGP-1	I	Jan 14, 2019	Jan 22, 2019	369.00	606.50	765.50	1,741.00
1292847	YYV WELL DRILLING INC	G	W4411667	1	AA	289D	0WCO26272			I	Jan 13, 2019	Jan 18, 2019	336.80	1,265.00		1,601.80
1753320	OED MECHANICAL SERVICES INC	G	W6331793	1	AA	345C LC	0TMA45538		BILLY	I	Jan 13, 2019	Jan 18, 2019	148.32	644.00	240.00	1,032.32
1878480	IYW PAVING	G	W9198419	7	AA	D6R II	0JUR93432	RLGP-3		O	Jan 13, 2019		1,714.30	1,546.00		3,260.30
1878480	IYW PAVING	G	W6918297	18	AA	D6RLGP	0UNO72225	RLGP-2	RLGP-2	I	Jan 12, 2019	Jan 20, 2019	369.00	606.50	765.50	1,741.00
1878480	IYW PAVING	G	W9823235	18	AA	D6TLGP T4F	0OIE72225	RLGP-4	RLGP-4	I	Jan 12, 2019	Jan 20, 2019	369.00	606.50	765.50	1,741.00
1878480	IYW PAVING	G	W4909514	18	AA	962M	0JVV45538	962M-2	962M-2	I	Jan 12, 2019	Jan 20, 2019	380.00	627.50	791.50	1,799.00
1031632	MAD CONTRACTOR LTD	G	W7751886	18	AA	914G2	0WTJ58265			O	Jan 11, 2019		345.58			345.58
1756000	VYU MECHANICAL SERVICES INC	G	W7148863	7	AA	328DLCR	0UVY84367	177	UNIT# 177	I	Jan 08, 2019	Jan 14, 2019		402.00	136.00	538.00
1878480	IYW PAVING	G	W1323747	18	AA	962M	0ABU58265	962M-3	962M-3	I	Jan 08, 2019	Jan 20, 2019	380.00	627.50	791.50	1,799.00
1878480	IYW PAVING	G	W2062349	18	AA	D6RLGP	0JUR93432	RLGP-3	RLGP-3	I	Jan 07, 2019	Jan 20, 2019	369.00	606.50	765.50	1,741.00
1437093	MRL CONSTRUCTION INC	G	W4063697	0	WV	P385	0AMU26272			I	Jan 07, 2019	Jan 13, 2019	163.59		125.00	288.59

This page displays a detailed table of all your work orders, organized by most recently opened date.

To filter the table:

1. Select the fields to filter by at the top of the page.
2. Select a date range.
3. Click the **[Submit]** button.

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

Click on a Work Order Number to view details regarding that work order.

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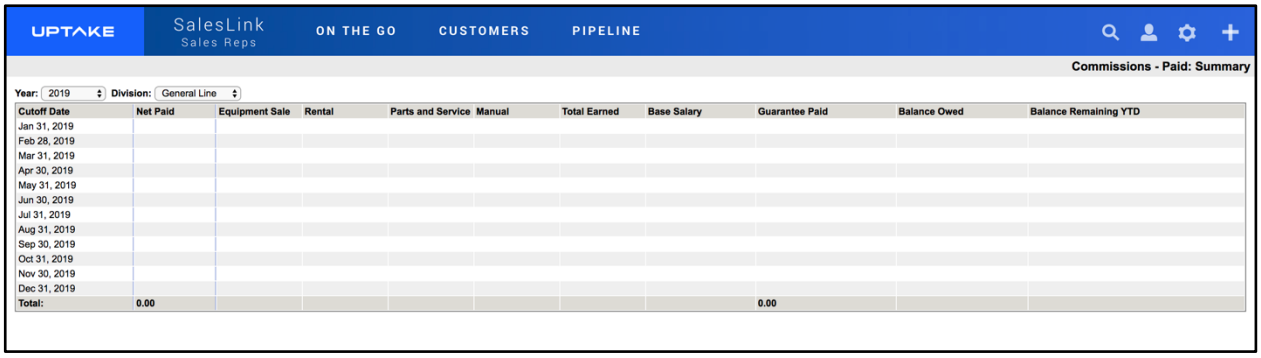
Commissions

Commissions – Paid: Summary

Click the **Commissions – Paid: Summary** link under PIPELINE in the top navigation bar. The Commissions – Paid: Summary page displays.



This page displays a detailed table of commissions that have been paid to you over the past year. Use the drop-down menus at the top of the page to filter the table by Year and Division. Click on a commission to view its details.

Commissions – In Process

Click the **Commissions – In Process** link under PIPELINE in the top navigation bar. The Commissions – In Process page displays.

This page displays a detailed table of all commissions that are currently in the process of being paid to you.

Commissions – Request

Click the **Commissions – Request** link under PIPELINE in the top navigation bar. The New Manual Commission page displays.

Enter all required information into the New Manual Commission form, then click **[Submit]** to request a commission manually.

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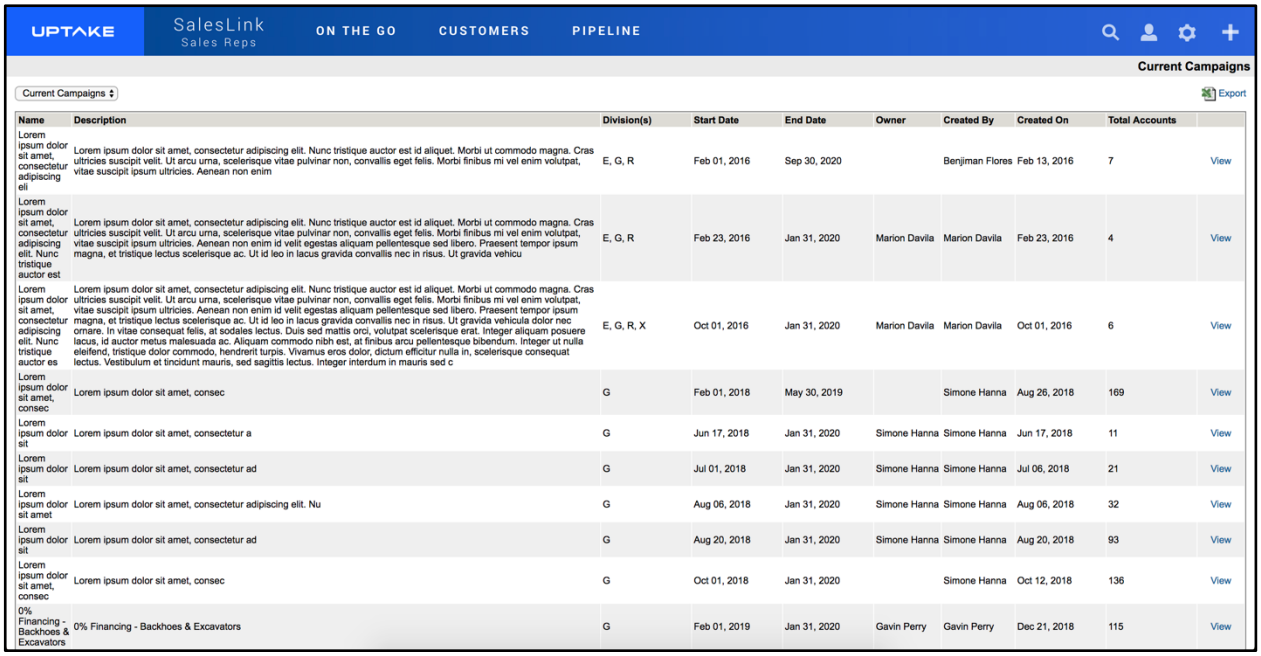
Insights

Campaigns

Click the **Campaigns** link under PIPELINE in the top navigation menu. The Current Campaigns page displays.



Name	Description	Division(s)	Start Date	End Date	Owner	Created By	Created On	Total Accounts	
Lorem ipsum dolor sit amet, consectetur adipiscing eli	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est id aliquet. Morbi ut commodo magna. Cras ultricies suscipit velit. Ut arcu urna, scelerisque vitae pulvinar non, convallis eget felis. Morbi finibus mi vel enim volutpat, vitae suscipit ipsum ultricies. Aenean non enim	E, G, R	Feb 01, 2016	Sep 30, 2020		Benjiman Flores	Feb 13, 2016	7	View
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est id aliquet. Morbi ut commodo magna. Cras ultricies suscipit velit. Ut arcu urna, scelerisque vitae pulvinar non, convallis eget felis. Morbi finibus mi vel enim volutpat, vitae suscipit ipsum ultricies. Aenean non enim id velit egestas aliquam pellentesque sed libero. Praesent tempor ipsum magna, et tristique lectus scelerisque ac. Ut id leo in lacus gravida convallis nec in risus. Ut gravida vehicu	E, G, R	Feb 23, 2016	Jan 31, 2020	Marion Davila	Marion Davila	Feb 23, 2016	4	View
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor es	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est id aliquet. Morbi ut commodo magna. Cras ultricies suscipit velit. Ut arcu urna, scelerisque vitae pulvinar non, convallis eget felis. Morbi finibus mi vel enim volutpat, vitae suscipit ipsum ultricies. Aenean non enim id velit egestas aliquam pellentesque sed libero. Praesent tempor ipsum magna, et tristique lectus scelerisque ac. Ut id leo in lacus gravida convallis nec in risus. Ut gravida vehicula dolor nec ornare. In vitae consequat felis, at sodales lectus. Duis sed mattis orci, volutpat scelerisque erat. Integer aliquam posuere lacus, id auctor metus malesuada ac. Aliquam commodo nibh est, at finibus arcu pellentesque bibendum. Integer ut nulla eleifend, tristique dolor commodo, hendrerit turpis. Vivamus eros dolor, dictum efficitur nulla in, scelerisque consequat lectus. Vestibulum et tincidunt mauris, sed sagittis lectus. Integer interdum in mauris sed c	E, G, R, X	Oct 01, 2016	Jan 31, 2020	Marion Davila	Marion Davila	Oct 01, 2016	6	View
Lorem ipsum dolor sit amet, consec	Lorem ipsum dolor sit amet, consec	G	Feb 01, 2018	May 30, 2019		Simone Hanna	Aug 26, 2018	169	View
Lorem ipsum dolor sit	Lorem ipsum dolor sit amet, consectetur a	G	Jun 17, 2018	Jan 31, 2020	Simone Hanna	Simone Hanna	Jun 17, 2018	11	View
Lorem ipsum dolor sit	Lorem ipsum dolor sit amet, consectetur ad	G	Jul 01, 2018	Jan 31, 2020	Simone Hanna	Simone Hanna	Jul 06, 2018	21	View
Lorem ipsum dolor sit amet	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nu	G	Aug 06, 2018	Jan 31, 2020	Simone Hanna	Simone Hanna	Aug 06, 2018	32	View
Lorem ipsum dolor sit	Lorem ipsum dolor sit amet, consectetur ad	G	Aug 20, 2018	Jan 31, 2020	Simone Hanna	Simone Hanna	Aug 20, 2018	93	View
Lorem ipsum dolor sit amet, consec	Lorem ipsum dolor sit amet, consec	G	Oct 01, 2018	Jan 31, 2020		Simone Hanna	Oct 12, 2018	136	View
0% Financing - Backhoes & Excavators	0% Financing - Backhoes & Excavators	G	Feb 01, 2019	Jan 31, 2020	Gavin Perry	Gavin Perry	Dec 21, 2018	115	View

This page displays a detailed table of your sales campaigns. Use the drop-down menu at the top left of the page to switch between History Campaigns, Current Campaigns, and Future Campaigns.

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

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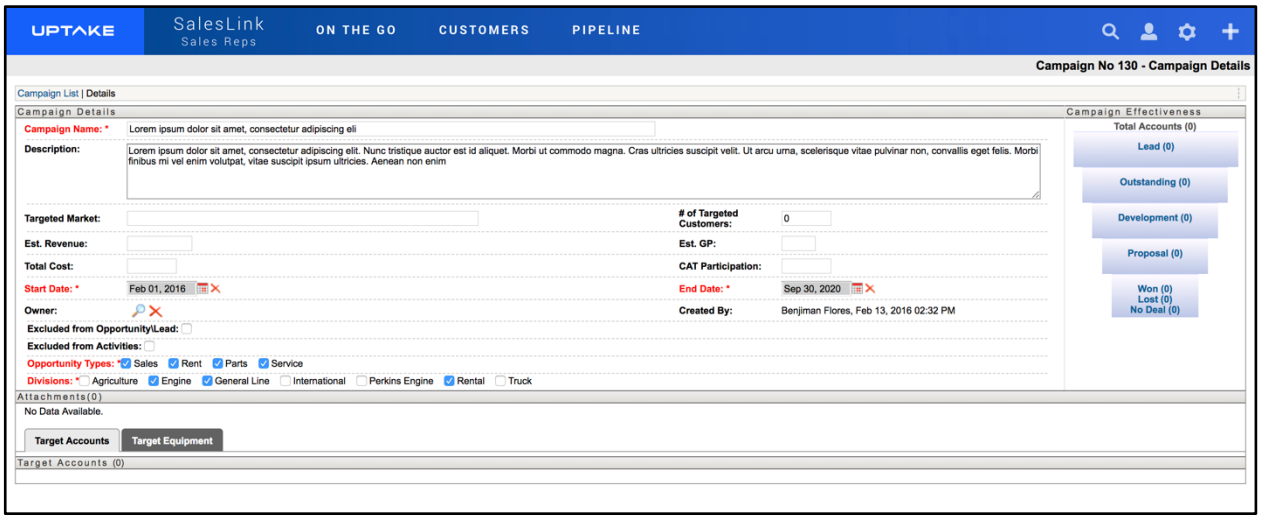
Campaign Details

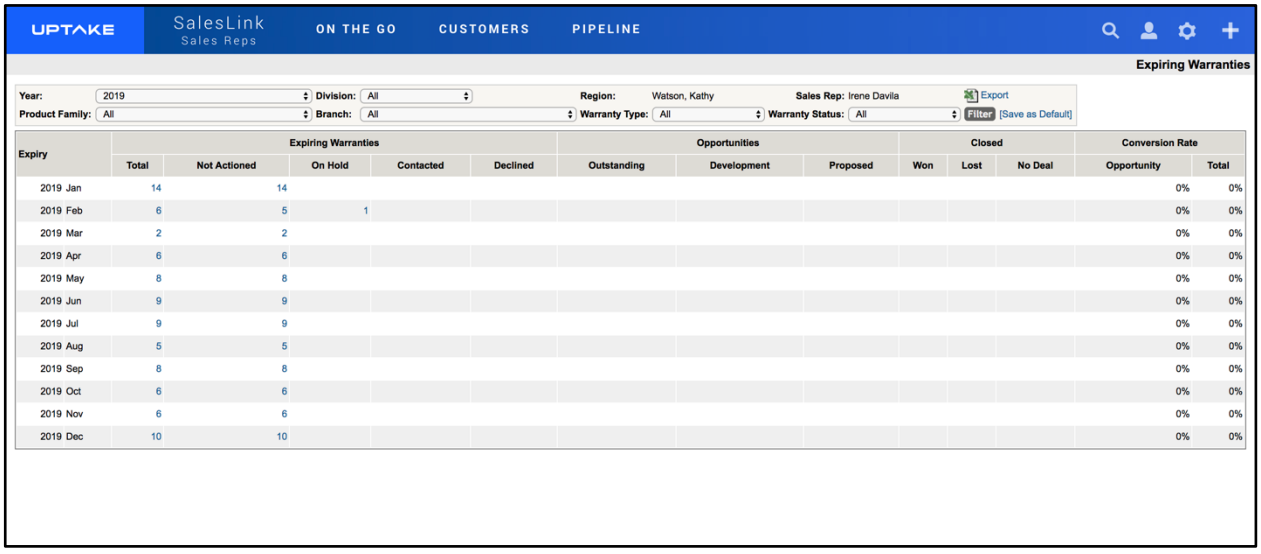
Click the **[View]** button next to a campaign to view its Campaign Details page.



You can edit any of the fields in the Campaign Details section. Use the Campaign Effectiveness links to the right to update the status of any accounts associated with the campaign.

Expiring Warranties

Click the **Expiring Warranties** link under PIPELINE in the top navigation bar. The Expiring Warranties page displays.



This page displays a detailed table of all expiring warranties in your accounts, organized by the month they're set to expire.

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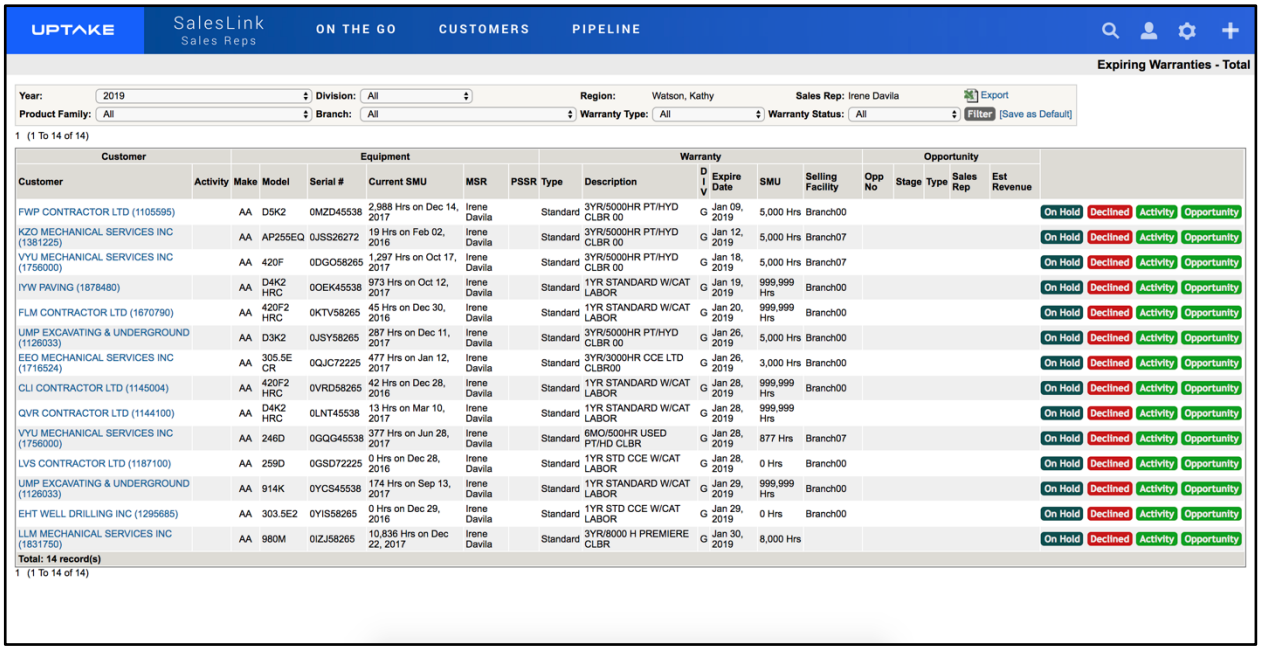
To filter the table:

1. Select the fields to filter by at the top of the page.
2. Select a date range.
3. Click the **[Filter]** button.
4. Click the **[Set as Default]** button to set this filter configuration as the default whenever you visit this page.

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

Click on a number in the table to view more details regarding those specific expiring warranties.



This page displays details regarding individual expiring warranties.

To filter the table:

1. Select the fields to filter by at the top of the page.
2. Select a date range.
3. Click the **[Filter]** button.
4. Click the **[Set as Default]** button to set this filter configuration as the default whenever you visit this page.

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

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To change the status of an individual warranty:

On Hold

1. Click the **[On Hold]** button.
2. Add any comments.
3. Click **[Save]**.

Declined

1. Click the **[Declined]** button.
2. Select a Reason from the drop-down menu.
3. Add any comments.
4. Click **[Save]**.

Activity

1. Click the **[Activity]** button.
2. Enter all required information into the Add New Activity form.
3. Click **[Save Activity]**.

Opportunity

1. Click the **[Opportunity]** button.
2. Enter all required information into the Add New Opportunity form.
3. Click **[Save Opportunity]**.

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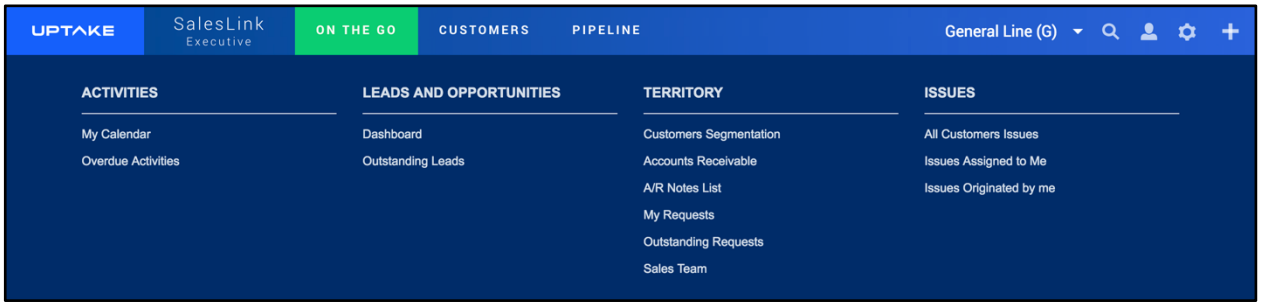
SALESLINK – EXECUTIVE

Log in to CloudLink with your Username and Password, then click the **[ENTER]** button under **SalesLink – Executive**. You will be taken to the SalesLink Executive Home page, which will be either the Customer Profiles page or the Key Indicator Dashboard page.

Navigation Bar

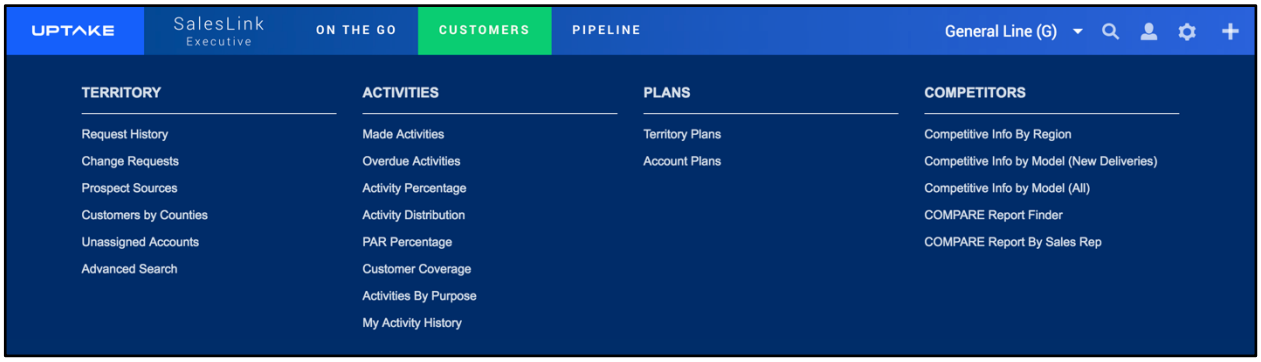
At the top of the screen is a navigation bar that can be accessed from anywhere in the application.

ON THE GO



Hover over the ON THE GO tab to access pages related to your Activities, Leads and Opportunities, Territory, and Issues.

CUSTOMERS



Hover over the CUSTOMERS tab to access pages related to your customer Territory, Activities, Plans, and Competitors.

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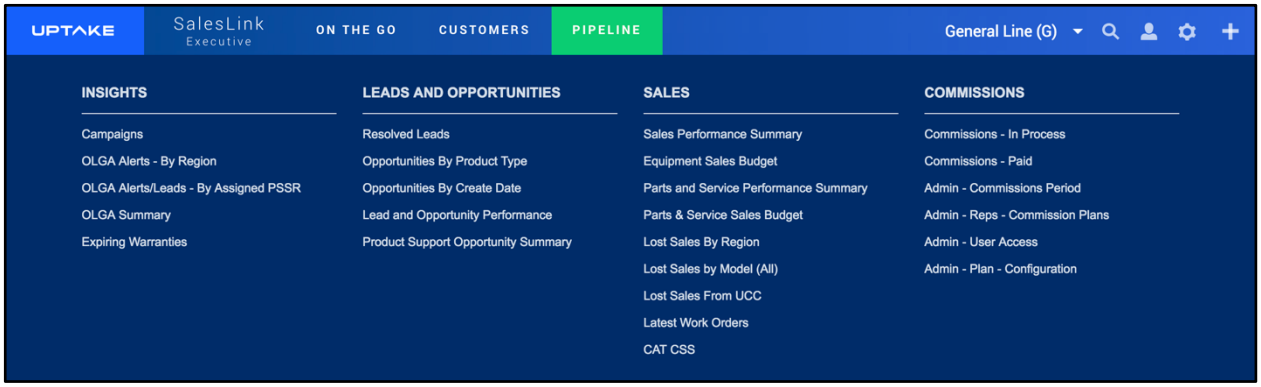
PIPELINE



Hover over the PIPELINE tab to access pages related to your current pipeline Insights, Leads and Opportunities, Sales, and Commissions.

DIVISIONS

Click on the Divisions drop-down menu to switch between your divisions.

SEARCH

Click on the Search icon and use the filters to find specific information within SalesLink.

PROFILE

Click on the Profile icon to view/edit your current User Profile information.

SETTINGS

Click on the Gear icon to manage the current information and settings in SalesLink for your dealership, such as Mail Codes, Influencer Types, UCC Information, Issue settings, etc.

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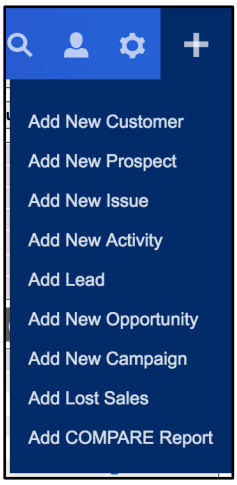
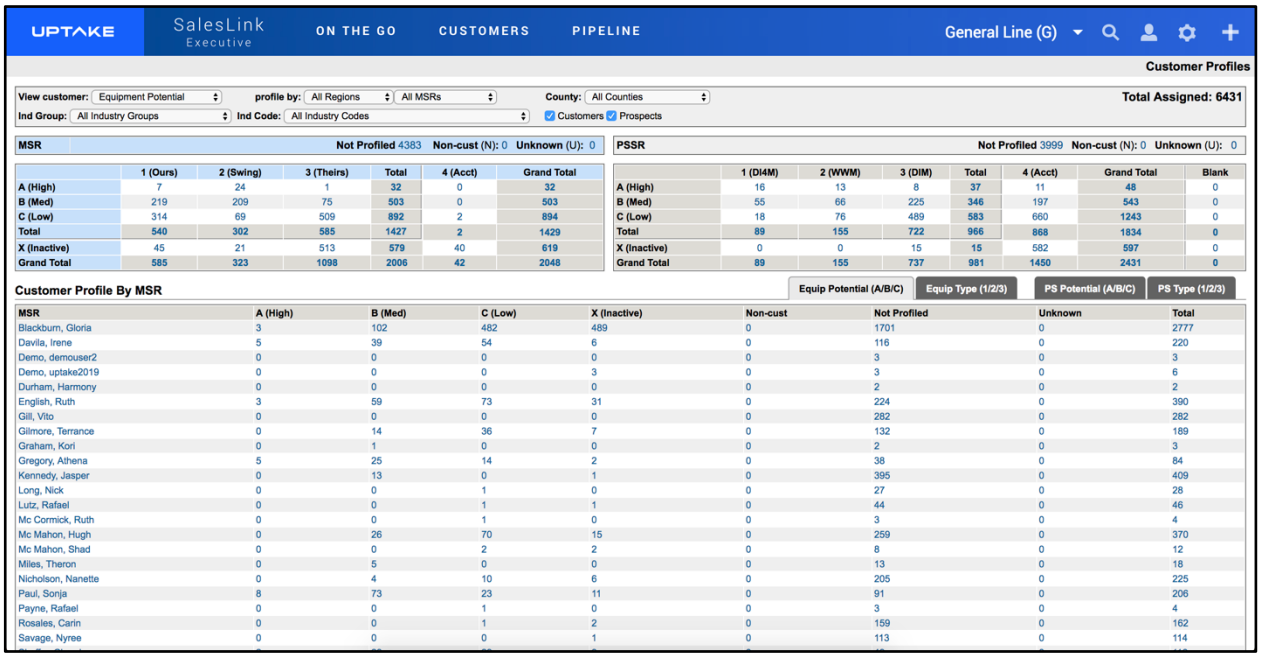
QUICK LINKS



Click on the Plus icon at the far right to quickly perform basic SalesLink tasks from anywhere in the application.

Customer Profiles

If Customer Profiles is not set as the Home page it can be accessed by clicking the **Customers Segmentation** link under ON THE GO in the top navigation bar.



The Customer Profiles page displays three tables with in-depth details regarding your dealership's current customers.

Use the filters at the top of the page to narrow down the customers that are displayed. The tables will automatically update as each filter is selected.

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Use the tabs in the bottom table to view customer profiles by Equip Potential, Equip Type, PS Potential, or PS Type.

MSR Definitions

Loyalty:

- **Ours:** Customer mainly purchases equipment sold by your dealership (75%+ of units) and your dealership is viewed as a preferred supplier for equipment needs.
- **Swing:** Customer's fleet is mixed between your dealership offerings and competitive units (40%-75%). Customer will purchase from supplier who offers best deal; not loyal to a brand.
- **Theirs:** Customer's fleet is mainly competitive equipment (Your dealership's supplied content is under 40%). This customer may be a loyal one, but not to your dealership.
- **Acct:** Sub-account of another – listed as an Accounting account in order to only show this customer once in the main profiles.
- **Non-Customer:** Supplier, Competitor, Vendor. A company that may, for example, buy parts from your dealership but would never buy equipment.
- **Unknown:** The sales rep has not met the customer and is not aware of what the potential is.

Growth:

- **High:** There is a 75%+ chance this customer will purchase equipment in the upcoming 12-18 month buying season.
- **Med:** There is a 50% chance this customer will purchase equipment in the upcoming 12-18 month buying season.
- **Low:** This customer is unlikely to be in market within the upcoming 12-18 month buying season.
- **Inact:** Account is inactive at this time and it is doubtful that any M&S revenue will be achieved.

PSSR Definitions

Loyalty:

- **DI4M (Do It for Me):** You have a relationship with this customer with possible maintenance agreements on the majority of their fleet. This customer uses your shops and field mechanics almost exclusively to look after their equipment and purchases the majority of their equipment parts from your dealership.

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- **WWM (Work with Me):** This customer will pick and choose the work that he has your dealership 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 PMs for the customer.

- **DIM (Do It Myself):** This customer prefers to do the work themselves with their own mechanics, or at another shop facility other than yours. He will shop his parts around, uses “will-fit” and/or service labor except for warranty work.

- **Acct:** Sub-account of another – listed as an Accounting account in order to only show this customer once in the main profiles

  Non-Customer: Supplier, Competitor, Vendor. A company that may, for example, buy parts from your dealership but would never buy equipment.

- **Unknown:** The sales rep has not met the customer and is not aware of what the potential is.

Growth:

- **High:** There is a high probability that you can increase your P&S revenue with this customer this year over the past year. Possibility exists to increase revenue at least 10% over the total levels of past year. Strong opportunity with this account.

- **Med:** There is a 50% chance that you can increase P&S revenues with this customer over the levels of the past year. You anticipate that with some targeted efforts, this customer spend with our P&S shops can increase over the levels of the past year.

- **Low:** You don’t believe this customer’s P&S spending can be increased over the coming year over the past year’s dollar revenue. It is probable that the same level of revenue will be achieved as in the previous year.

- **Inact:** Account is mostly inactive at this time and it is doubtful that any P&S revenue will be achieved.

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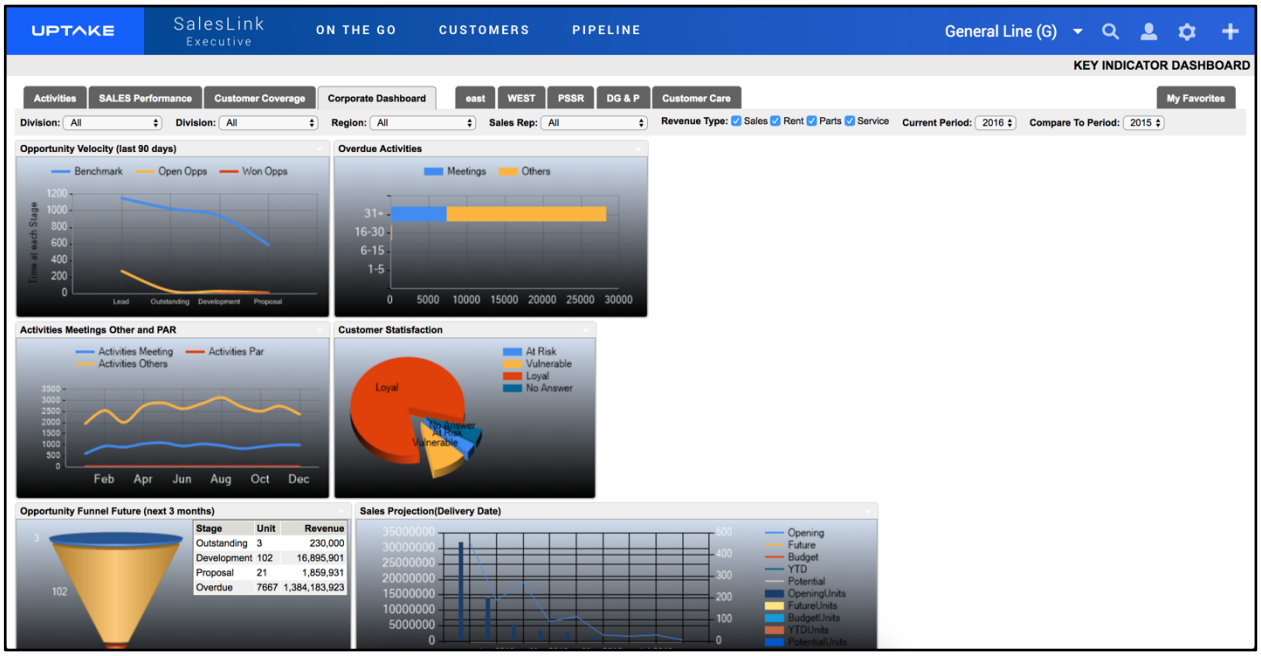
Key Indicator Dashboard

If the Key Indicator Dashboard is not set as the Home page it can be accessed by clicking the **Dashboard** link under ON THE GO in the top navigation bar.



Toggle between dashboards by clicking on the tabs at the top of the page. Each dashboard displays different widgets containing valuable at-a-glance information.

To filter the widgets:

1. Select the fields you want to filter by at the top of the page.
2. Select the year you want to filter from.

The widgets will automatically update as filters are applied.

Widgets:

- **Conversion Rate –** A history bar graph showing win/loss units and conversion rate percentage. Extended view to show total as is currently displayed in units and revenue.

- **Customer Satisfaction –** Survey results from CSM as At Risk, Vulnerable, and Loyal ratio per month.

- **Sales Projection –** Displays three months back and six months forward. Toggle between estimated delivery month and order month for future opportunities (or have 2 widgets). Extended view should display satisfaction by question category.
    - PSSR Reps – Parts widget and Service widget to display revenue
    - MSR – Sales widget to display units

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  - RSR – Rental widget to display units
  - Executive – All widgets

- **Open Opportunities –** Shows the number of OPEN opportunities (machine quantities) in SalesLink for the corresponding estimated decision (CLOSE) month.

- **Cumulative Future Deliveries –** Shows the number of machines in SalesLink where the status is set as WON. This is effectively a cumulative future projection of machine deliveries for deals where orders are secured.

- **Budget Business Plan –** Financial year budget (number of units). This is the FY target to meet/exceed and against which progressive performance is monitored.

- **Cumulative YTD deliveries –** Shows the number of machines in SalesLink where the status is set as WON and the estimated date of delivery has passed.

- **Potential Business Plan –** Considers cumulative wins plus open opportunities divided by the sales funnel ratio. This gives a projection of where the actual business plan could be, based on the quantity of opportunities and current win closure rate.

- **Parts Opportunity –** Displays three months back and six months forward. Displays delivery month for won opportunities. Displays revenue as a stacked bar by commodity.

- **PTOS History –** Displays Parts actual sales, predicted PTOS sales, and Reps won opportunities for the last six months by dollar volume. The expanded view shows four columns: Commodity, Market size, Actual sales, and Won opportunities.

- **Opportunity Funnel –** Displays open Opps at Qualification, Development, and Proposal stages for the next three months and an indicator number for unknowns (overdue).

- **Activities –** Displays three lines: Meetings, Others, and a PAR line calculated from the total of all PAR's in primary division divided by 12. Graph displays six months of history and next 30 days of future dated activities.

- **Overdue Activities –** Displays stacked bar showing two categories (Meetings and Others). The extended count should show two columns displaying the count for each category.

- **Change Request –** Displays six months on a graph showing all change requests submitted and an indicator for uncompleted follow-up requests. The expanded view should display type of request on the left and the six-month total for each category in the column.

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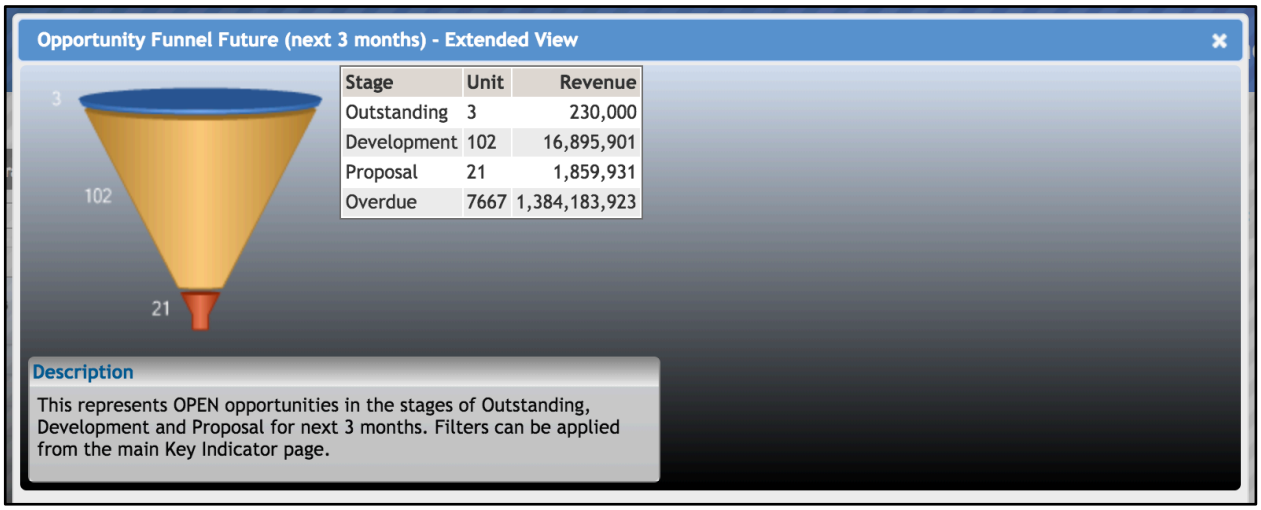
Add to My Favorites

1. Click the down arrow at the top right corner of the widget you want to add to the My Favorites dashboard.
2. Select **My Favorites** under Add to Dashboards.

You can add as many widgets as you want to create a personalized My Favorites dashboard. To remove a widget, click the X next to the down arrow at the top right.

Extended View

To display an Extended View of a widget, click the down arrow and select **Extended View** under Views, or click anywhere inside the body of the widget.



The Extended View contains the same information as the original widget, along with a more detailed description and links related to the source data (if available).

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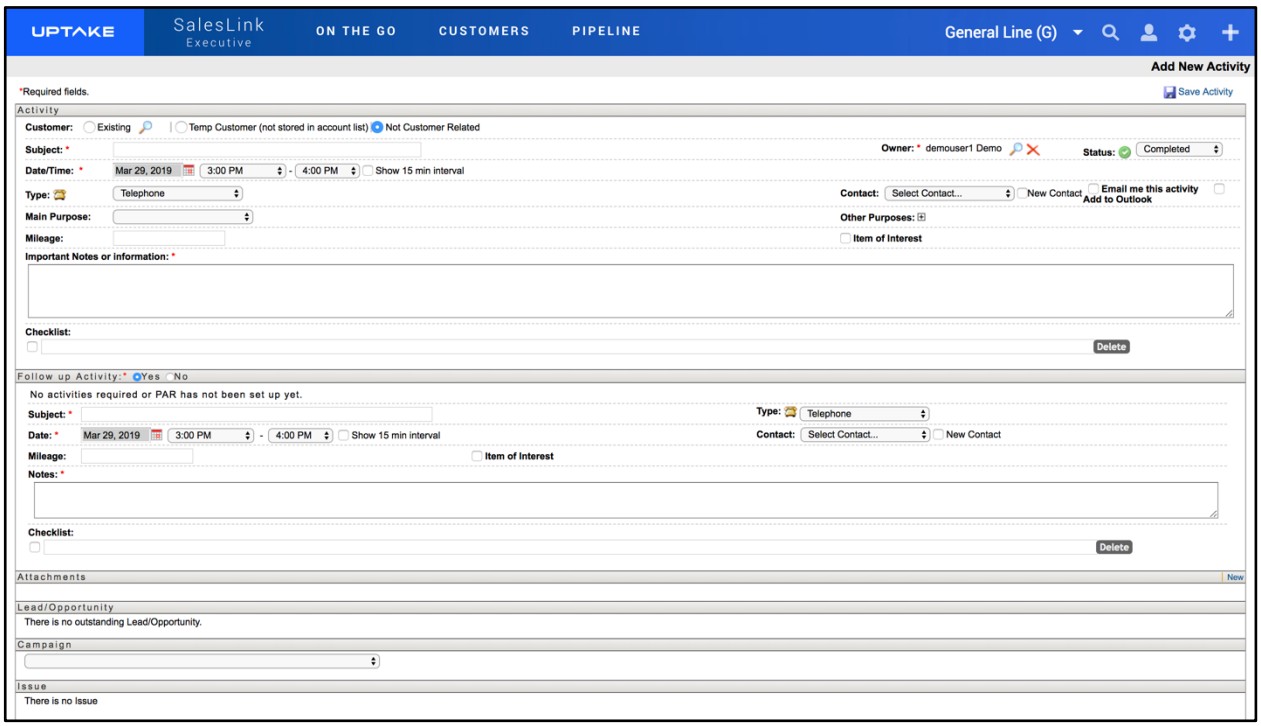
Activities

Activities are an indicator of how your sales reps are engaging with customers and of how much time they're spending with them.

Add New Activity

To add a new activity:

1. From the My Calendar page, click the **[Add New]** button at the bottom right corner of the day you want to schedule the activity in the calendar. From the top navigation bar, click the **[Add New Activity]** button under the Plus icon.
2. Enter all required information into the Add New Activity form.
3. Click the **[Save Activity]** button at the top right or bottom right of the page.



Once saved, the activity will appear in its Owner's calendar.

Helpful Information

Status:

- Outstanding – activity is scheduled and has not occurred yet
- Completed – activity has been completed (a follow-up activity can now be scheduled)
- Cancelled – a planned activity has been cancelled for any reason
- Overdue (visible on calendar and reports only) – if an activity has a scheduled date before the current date, the status will automatically change

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Not Scheduled (visible on calendar and reports only) – if an activity does not have a scheduled date, the status will automatically change.

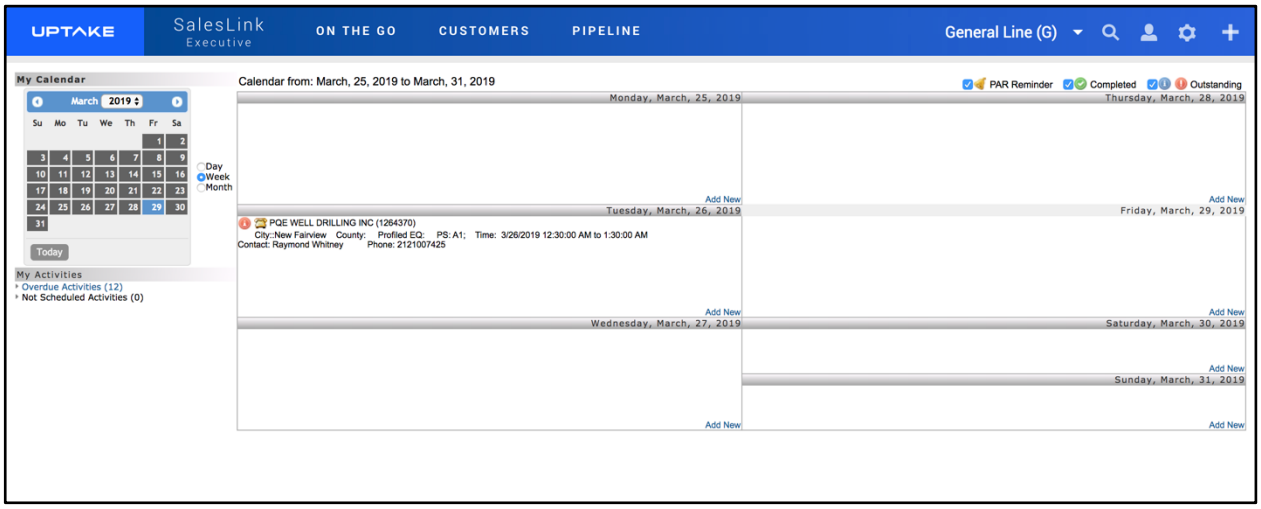
Type:

- Email – suggest: attaching the email in the activity in the attachment section
- Fax – suggest: indicating fax information in notes (i.e. subject, date, time, etc.)
- Letter – if soft copy is available, suggest attaching it in the attachment section
- Meeting – keep notes of what was discussed in the notes section and create a follow-up activity with any outstanding items
- Message – if the message was left with someone other than the contact's voicemail, suggest indicating who the message was left with
- Special Event – examples would be a trade show or open house
- Telephone – detail the information from the conversation

Follow-up Activity:
This option will only appear if the Status of the opportunity is set to Completed. If Follow-up Activity is checked Yes, the same fields as entering a new activity will appear. It will also suggest when to make the next activity based on the customer's PAR. If the activity is not customer related or if it's for a new customer, it will assume the PAR is 0.

My Calendar

Click the **My Calendar** link under ON THE GO in the top navigation bar. The My Calendar page displays.



This page displays a calendar of your activities for the current week. Hover your cursor over an activity to view more details. Use the smaller calendar to the left to change the week displayed.

Below the small calendar are useful links related to your Overdue Activities and Not Scheduled Activities.

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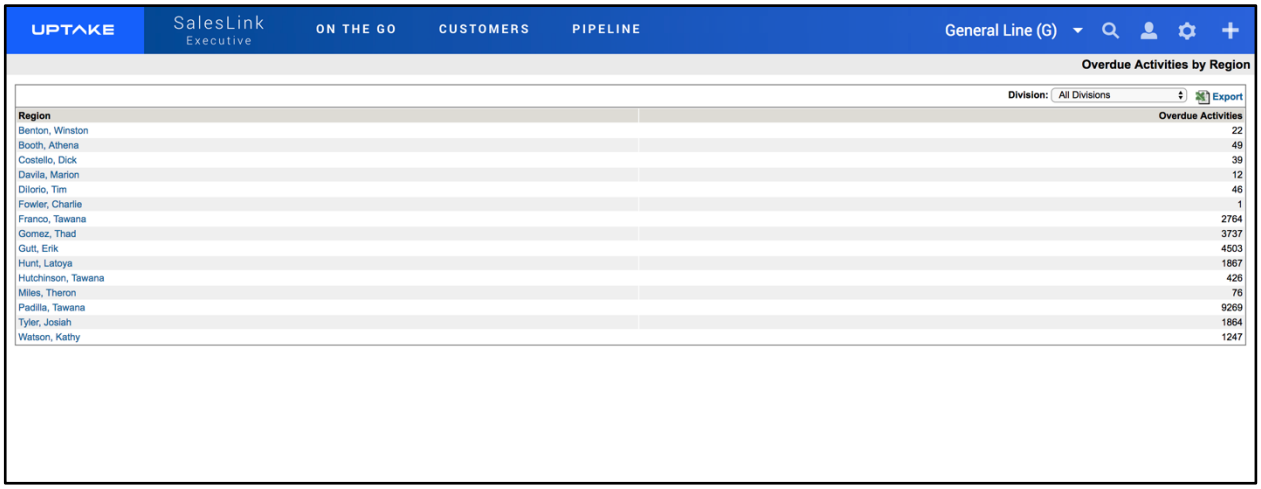
Overdue Activities

Click the **Overdue Activities** link either under ON THE GO or CUSTOMERS in the top navigation bar. The Overdue Activities by Region page displays.



This page displays a list of all overdue activities in your dealership, organized by the sales rep they're associated with. Click on the name of a sales rep to view that person's overdue activities.

Filter the list by selecting from the **Division** drop-down menu to view overdue activities for a specific division.

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

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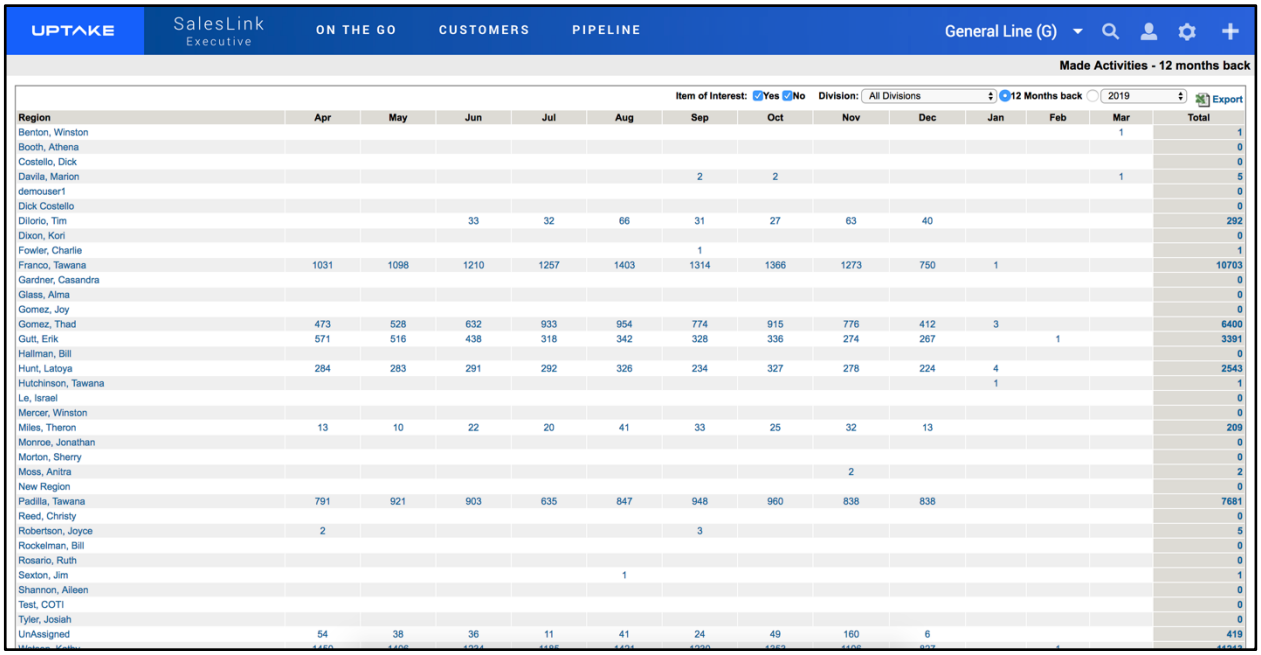
Made Activities

Click the **Made Activities** link under CUSTOMERS in the top navigation bar. The Made Activities page displays.



Region	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total
Benton, Winston												1	1
Booth, Athena													0
Costello, Dick													0
Davila, Marion						2	2					1	5
demouser1													0
Dick Costello													0
Dilorio, Tim			33	32	66	31	27	63	40				292
Dixon, Kori													0
Fowler, Charlie						1							1
Franco, Tawana	1031	1098	1210	1257	1403	1314	1366	1273	750	1			10703
Gardner, Casandra													0
Glass, Alma													0
Gomez, Joy													0
Gomez, Thad	473	528	632	933	954	774	915	776	412	3			6400
Gutt, Erik	571	516	438	318	342	328	336	274	267		1		3391
Hallman, Bill													0
Hunt, Latoya	284	283	291	292	326	234	327	278	224	4			2543
Hutchinson, Tawana										1			1
Le, Israel													0
Mercer, Winston													0
Miles, Theron	13	10	22	20	41	33	25	32	13				209
Monroe, Jonathan													0
Morton, Sherry													0
Moss, Anitra								2					2
New Region													0
Padilla, Tawana	791	921	903	635	847	948	960	838	838				7681
Reed, Christy													0
Robertson, Joyce	2					3							5
Rockelman, Bill													0
Rosario, Ruth													0
Sexton, Jim					1								1
Shannon, Aileen													0
Test, COTI													0
Tyler, Josiah													0
UnAssigned	54	38	36	11	41	24	49	160	6				419

This page displays a table of all activities created over the past 12 months, organized by sales rep and the month the activities were created. Click on a number to view details regarding the activities created by a specific sales rep.

To filter the table:

1. Select the fields you want to filter by at the top of the page.
2. Select the year you want to filter from.

The table will automatically update as filters are applied.

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

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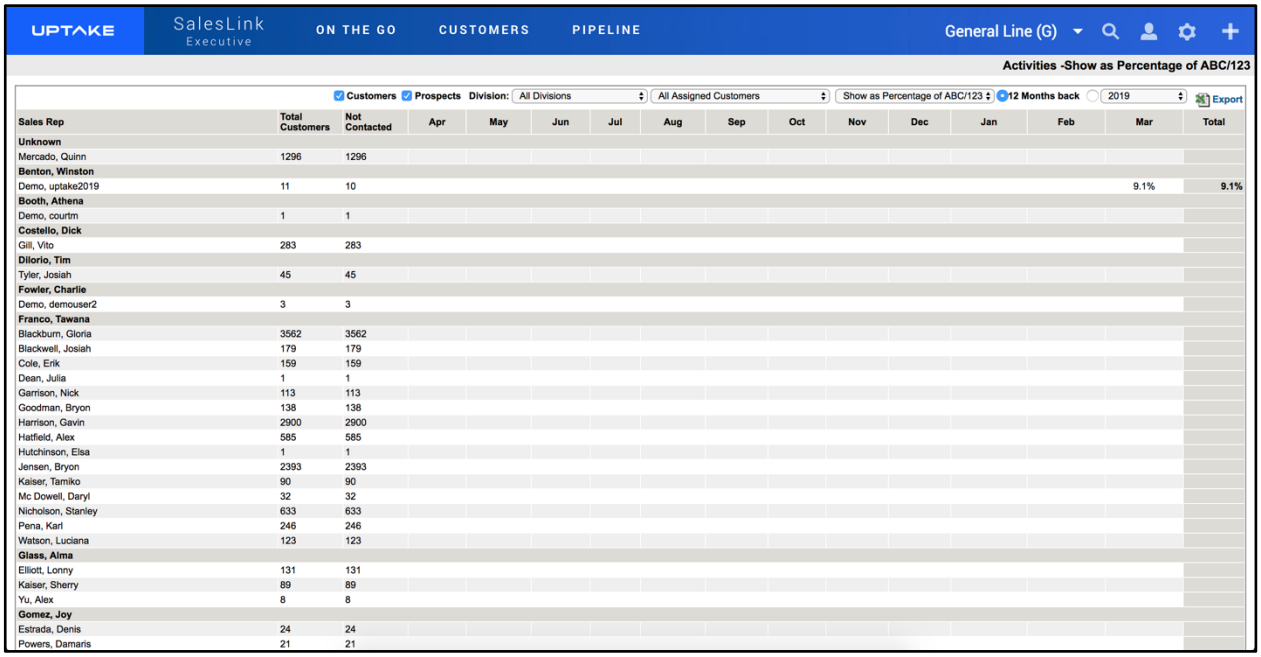
Activity Percentage

Click the **Activity Percentage** link under CUSTOMERS in the top navigation bar. The Activities – Show as Percentage page displays.



Sales Rep	Total Customers	Not Contacted	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total
Unknown															
Mercado, Quinn	1296	1296													
Benton, Winston															
Demo, uptake2019	11	10												9.1%	9.1%
Booth, Athena															
Demo, courtm	1	1													
Costello, Dick															
Gill, Vito	283	283													
Dilorio, Tim															
Tyler, Josiah	45	45													
Fowler, Charlie															
Demo, demouser2	3	3													
Franco, Tawana															
Blackburn, Gloria	3562	3562													
Blackwell, Josiah	179	179													
Cole, Erik	159	159													
Dean, Julia	1	1													
Garrison, Nick	113	113													
Goodman, Bryon	138	138													
Harrison, Gavin	2900	2900													
Hatfield, Alex	585	585													
Hutchinson, Elsa	1	1													
Jensen, Bryon	2393	2393													
Kaiser, Tamiko	90	90													
Mc Dowell, Daryl	32	32													
Nicholson, Stanley	633	633													
Pena, Karl	246	246													
Watson, Luciana	123	123													
Glass, Alma															
Elliott, Lonny	131	131													
Kaiser, Sherry	89	89													
Yu, Alex	8	8													
Gomez, Joy															
Estrada, Denis	24	24													
Powers, Damaris	21	21													

The table on this page displays the percentage of customers a sales rep contacted over the past 12 months.

To filter the table:

1. Select the fields you want to filter by at the top of the page.
2. Select the year you want to filter from.

The table will automatically update as filters are applied.

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

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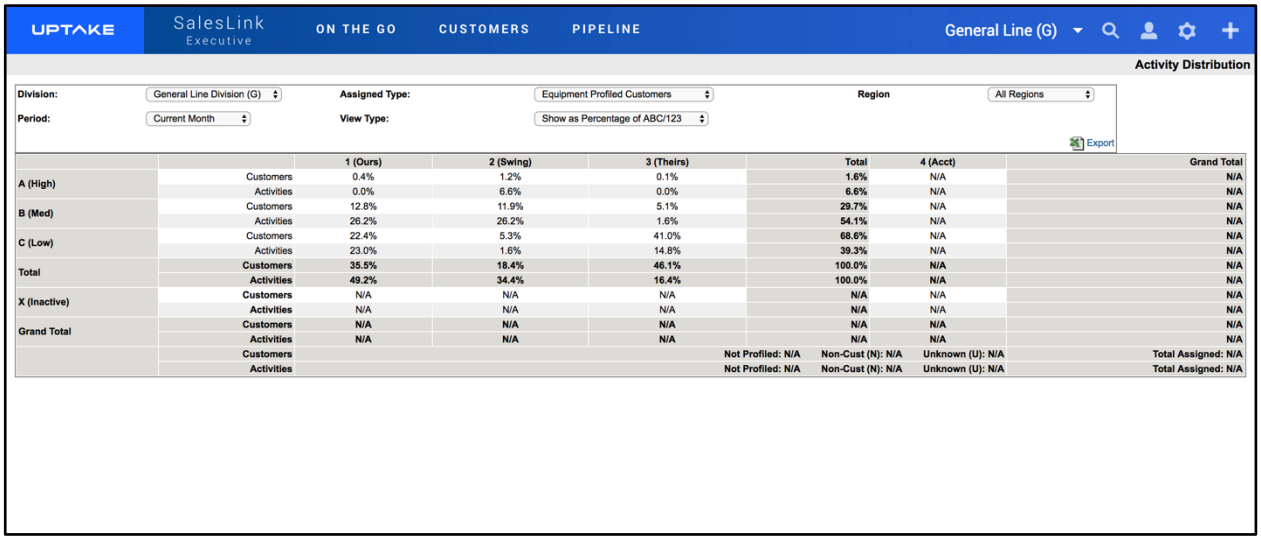
Activity Distribution

Click the **Activity Distribution** link under CUSTOMERS in the top navigation bar. The Activity Distribution page displays.



		1 (Ours)	2 (Swing)	3 (Theirs)	Total	4 (Acct)	Grand Total
A (High)	Customers	0.4%	1.2%	0.1%	1.6%	N/A	N/A
	Activities	0.0%	6.6%	0.0%	6.6%	N/A	N/A
B (Med)	Customers	12.8%	11.9%	5.1%	29.7%	N/A	N/A
	Activities	26.2%	26.2%	1.6%	54.1%	N/A	N/A
C (Low)	Customers	22.4%	5.3%	41.0%	68.6%	N/A	N/A
	Activities	23.0%	1.6%	14.8%	39.3%	N/A	N/A
Total	Customers	35.5%	18.4%	46.1%	100.0%	N/A	N/A
	Activities	49.2%	34.4%	16.4%	100.0%	N/A	N/A
X (Inactive)	Customers	N/A	N/A	N/A	N/A	N/A	N/A
	Activities	N/A	N/A	N/A	N/A	N/A	N/A
Grand Total	Customers	N/A	N/A	N/A	N/A	N/A	N/A
	Activities	N/A	N/A	N/A	N/A	N/A	N/A
	Customers				Not Profiled: N/A	Non-Cust (N): N/A	Unknown (U): N/A	Total Assigned: N/A
	Activities				Not Profiled: N/A	Non-Cust (N): N/A	Unknown (U): N/A	Total Assigned: N/A

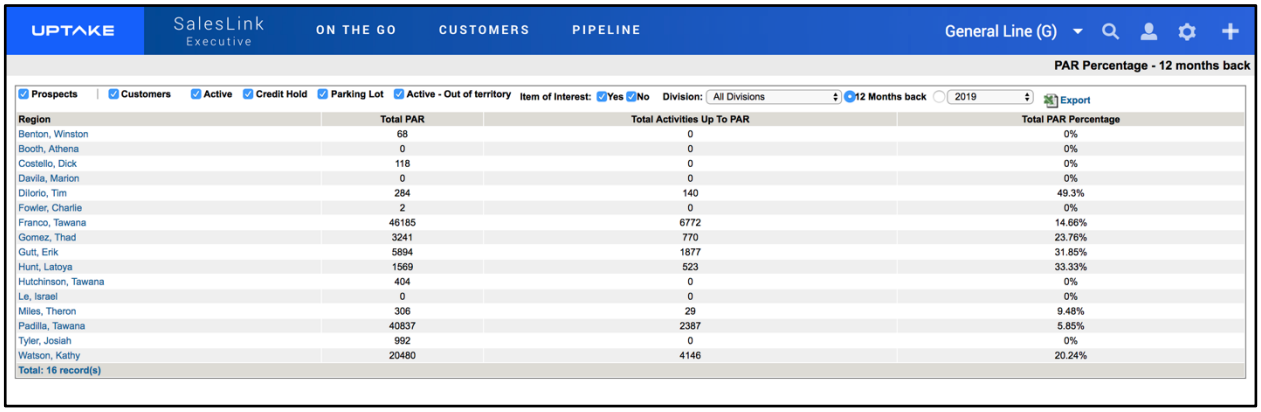
The table on this page displays the percentage of activities created for each customer type. For more information on the customer type definitions, see the **Customer Profiles** section.

Filter the table using the filter drop-down menus at the top of the page. The table will automatically update as each filter is selected.

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

PAR Percentage

Click the **PAR Percentage** link under CUSTOMERS in the top navigation bar. The PAR Percentage page displays.



Region	Total PAR	Total Activities Up To PAR	Total PAR Percentage
Benton, Winston	68	0	0%
Booth, Athena	0	0	0%
Costello, Dick	118	0	0%
Davila, Marion	0	0	0%
Dilorio, Tim	284	140	49.3%
Fowler, Charlie	2	0	0%
Franco, Tawana	46185	6772	14.66%
Gomez, Thad	3241	770	23.76%
Gutt, Erik	5894	1877	31.85%
Hunt, Latoya	1569	523	33.33%
Hutchinson, Tawana	404	0	0%
Le, Israel	0	0	0%
Miles, Theron	306	29	9.48%
Padilla, Tawana	40837	2387	5.85%
Tyler, Josiah	992	0	0%
Watson, Kathy	20480	4146	20.24%
Total: 16 record(s)			

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The table on this page displays PAR Percentages over the past 12 months, organized by Region.

To filter the table:

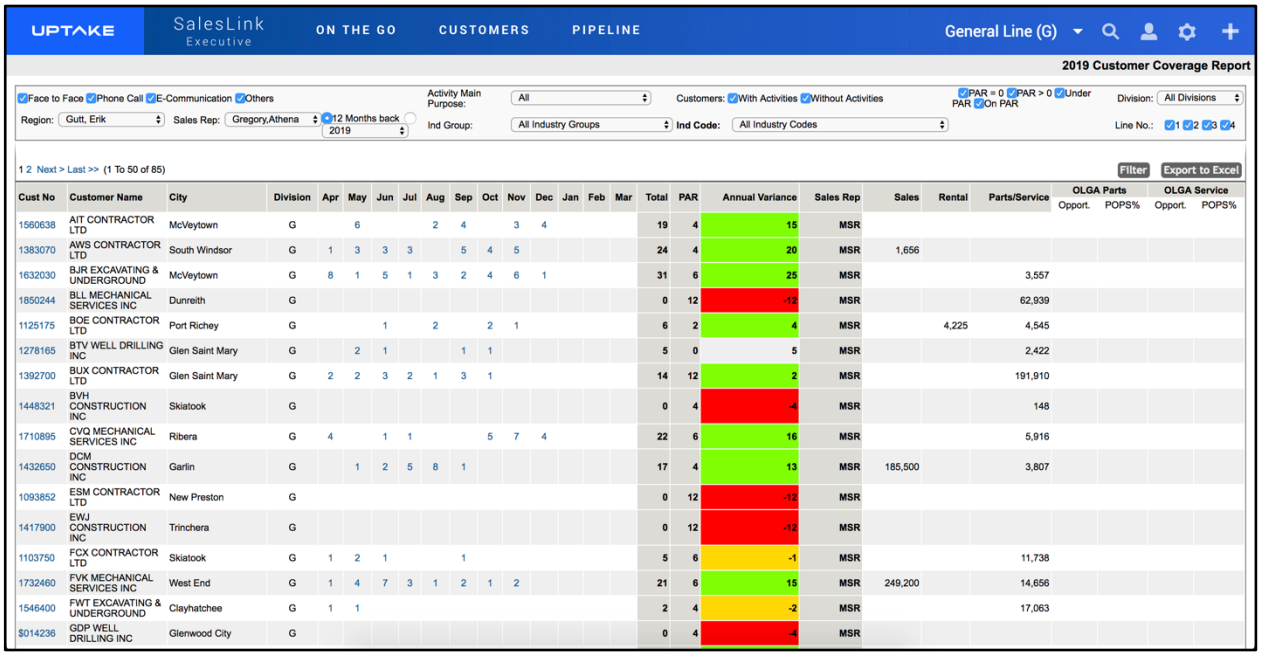
1. Select the fields you want to filter by at the top of the page.
2. Select the year you want to filter from.

The table will automatically update as filters are applied.

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

Customer Coverage

Click the **Customer Coverage** link under CUSTOMERS in the top navigation bar. The Customer Coverage Report page displays.



Cust No	Customer Name	City	Division	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total	PAR	Annual Variance	Sales Rep	Sales	Rental	Parts/Service	OLGA Parts Opport.	OLGA Parts POPS%	OLGA Service Opport.	OLGA Service POPS%
1560638	AIT CONTRACTOR LTD	McVeytown	G		6			2	4		3	4				19	4	15	MSR							
1383070	AWS CONTRACTOR LTD	South Windsor	G	1	3	3	3		5	4	5					24	4	20	MSR	1,656						
1632030	BJR EXCAVATING & UNDERGROUND	McVeytown	G	8	1	5	1	3	2	4	6	1				31	6	25	MSR			3,557				
1850244	BLL MECHANICAL SERVICES INC	Dunreith	G													0	12	-12	MSR			62,939				
1125175	BOE CONTRACTOR LTD	Port Richey	G			1		2		2	1					6	2	4	MSR		4,225	4,545				
1278165	BTV WELL DRILLING INC	Glen Saint Mary	G		2	1			1	1						5	0	5	MSR			2,422				
1392700	BUX CONTRACTOR LTD	Glen Saint Mary	G	2	2	3	2	1	3	1						14	12	2	MSR			191,910				
1448321	BVH CONSTRUCTION INC	Skiatook	G													0	4	-4	MSR			148				
1710895	CVQ MECHANICAL SERVICES INC	Ribera	G	4		1	1			5	7	4				22	6	16	MSR			5,916				
1432650	DCM CONSTRUCTION INC	Garlin	G		1	2	5	8	1							17	4	13	MSR	185,500		3,807				
1093852	ESM CONTRACTOR LTD	New Preston	G													0	12	-12	MSR							
1417900	EWJ CONSTRUCTION INC	Trinchera	G													0	12	-12	MSR							
1103750	FCX CONTRACTOR LTD	Skiatook	G	1	2	1			1							5	6	-1	MSR			11,738				
1732460	FVK MECHANICAL SERVICES INC	West End	G	1	4	7	3	1	2	1	2					21	6	15	MSR	249,200		14,656				
1546400	FWT EXCAVATING & UNDERGROUND	Clayhatchee	G	1	1											2	4	-2	MSR			17,063				
$014236	GDP WELL DRILLING INC	Glenwood City	G													0	4	-4	MSR							

The report displayed represents all completed activities and whether that coverage is in line with the PAR of the Customer. The table is displayed in alphabetical order according to customer. Click on a table header to sort that column in ascending or descending order.

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.

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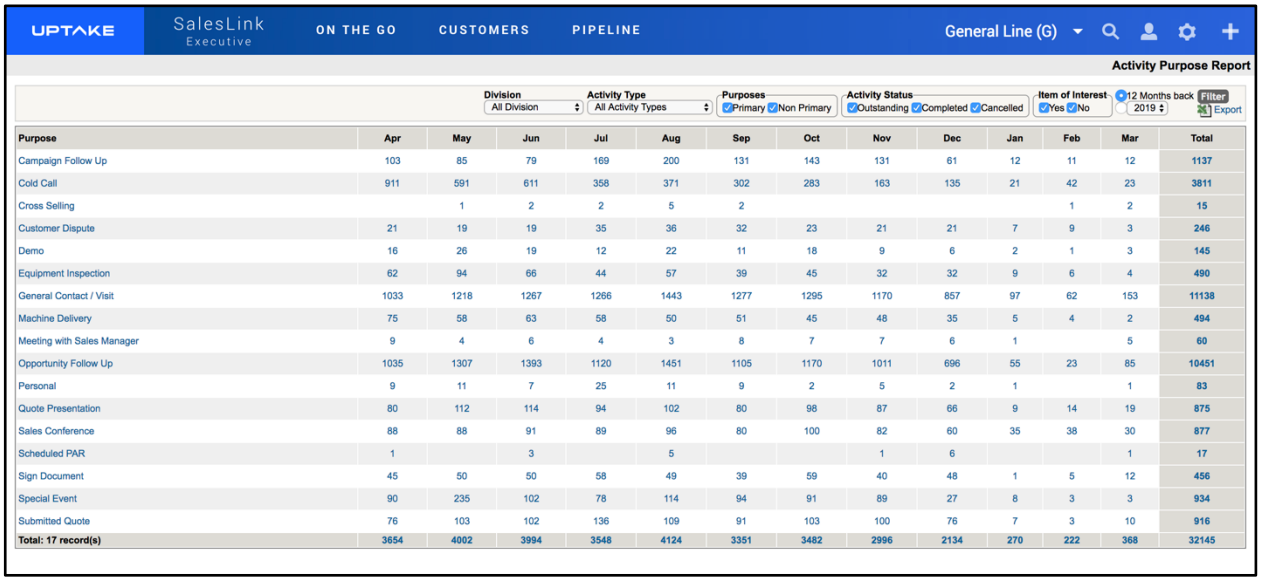
To filter the table:

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 to Excel]** button at the top right of the table.

Activities by Purpose

Click the **Activities by Purpose** link under CUSTOMERS in the top navigation bar. The Activity Purpose Report page displays.



Purpose	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total
Campaign Follow Up	103	85	79	169	200	131	143	131	61	12	11	12	1137
Cold Call	911	591	611	358	371	302	283	163	135	21	42	23	3811
Cross Selling		1	2	2	5	2					1	2	15
Customer Dispute	21	19	19	35	36	32	23	21	21	7	9	3	246
Demo	16	26	19	12	22	11	18	9	6	2	1	3	145
Equipment Inspection	62	94	66	44	57	39	45	32	32	9	6	4	490
General Contact / Visit	1033	1218	1267	1266	1443	1277	1295	1170	857	97	62	153	11138
Machine Delivery	75	58	63	58	50	51	45	48	35	5	4	2	494
Meeting with Sales Manager	9	4	6	4	3	8	7	7	6	1		5	60
Opportunity Follow Up	1035	1307	1393	1120	1451	1105	1170	1011	696	55	23	85	10451
Personal	9	11	7	25	11	9	2	5	2	1		1	83
Quote Presentation	80	112	114	94	102	80	98	87	66	9	14	19	875
Sales Conference	88	88	91	89	96	80	100	82	60	35	38	30	877
Scheduled PAR	1		3		5			1	6			1	17
Sign Document	45	50	50	58	49	39	59	40	48	1	5	12	456
Special Event	90	235	102	78	114	94	91	89	27	8	3	3	934
Submitted Quote	76	103	102	136	109	91	103	100	76	7	3	10	916
Total: 17 record(s)	3654	4002	3994	3548	4124	3351	3482	2996	2134	270	222	368	32145

This page displays a list of all activities over the past 12 months organized by their purpose.

Click on a Purpose to view all activities with that associated purpose. You can also click on a number in a month column to view all activities with that associated purpose that occurred during that specific month.

To filter the table:

1. Select which 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 page.

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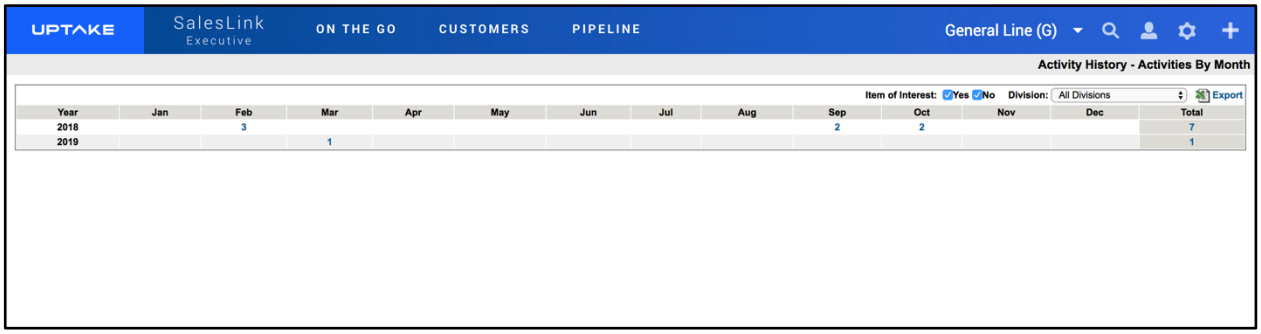
My Activity History

Click the **My Activity History** link under CUSTOMERS in the top navigation bar. The Activity History page displays.



This page displays a complete list of all activities you've logged. The table is organized by the year and month that the activities occurred. You can filter the table by **Item of Interest** and/or **Division**.

Click on one of the activity numbers to view details regarding all of your activities during that specific month or year.

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

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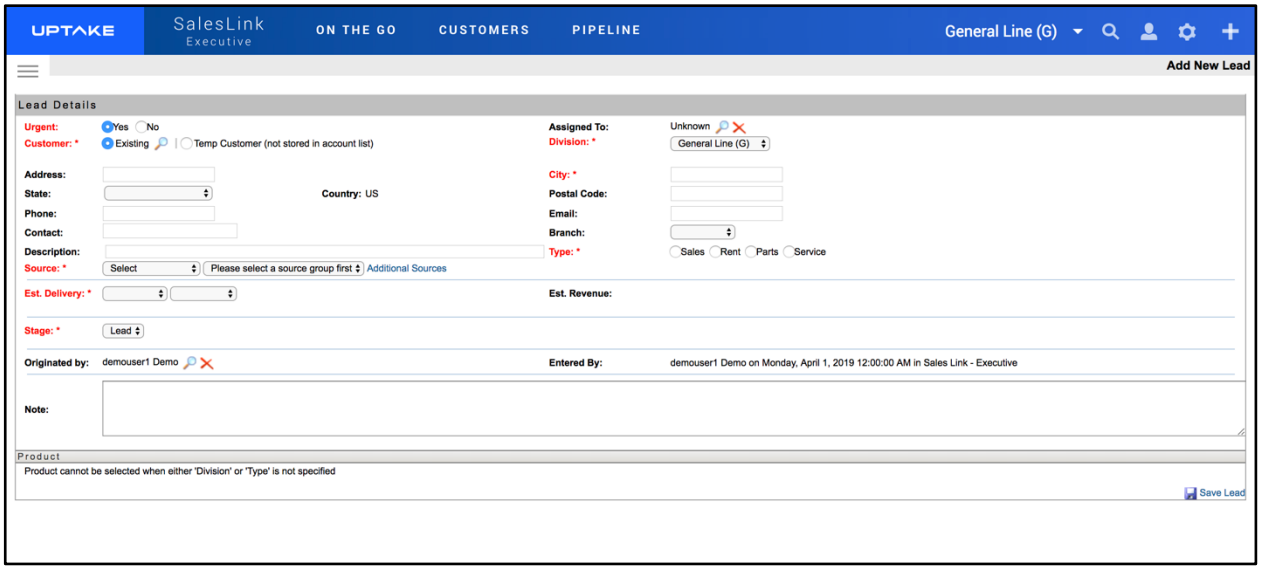
Leads and Opportunities

Add New Lead

To add a new lead:

1. Click the Plus icon at the far right of the top navigation bar, then click the **[Add Lead]** button in the drop-down menu.
2. Enter all required information into the fields in the Add New Lead form.
3. Once the lead's Division and Type have been specified, you will have the option of entering information into the Product section.
4. Click the **[Save Lead]** button.



Once a lead has been created it will be added to the Outstanding Leads page.

Edit Lead

To edit a lead:

1. Select a lead from the Outstanding Leads page. You will be taken to its Lead Details page.
2. Make all necessary changes to the lead.
3. Click the **[Save Lead]** button at the bottom right of the page.

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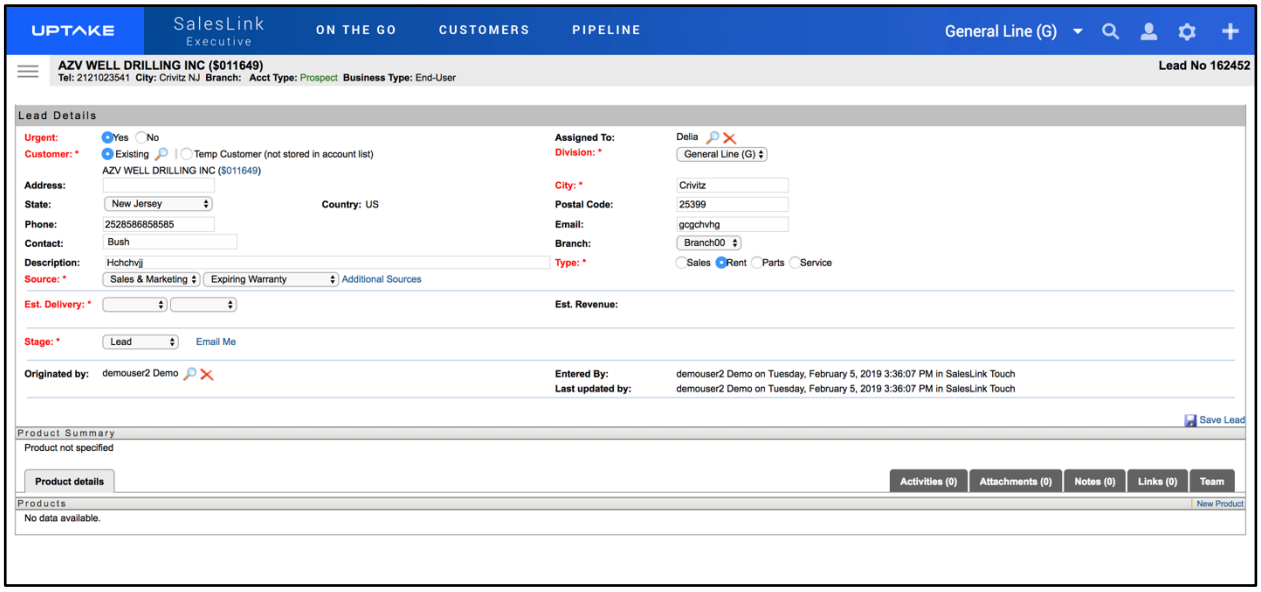
Transfer Lead to Opportunity

The Outstanding Leads page displays a list of all leads that need to be followed up on. Click on a lead to view its Lead details.



1. Add any activities that occurred when following up on the lead by clicking the Activities tab at the bottom of the page, then click the **[New]** button.
2. Enter all required information into the Add New Activity form, then click **[Save Activity]** to add it to the lead.
3. In the Lead Details section, click the **Stage** drop-down menu and select the current stage of the lead (Outstanding, Development, or Proposal) to promote the lead to an opportunity.
4. Click the **[Save Lead]** button to promote the lead to an opportunity.

As the opportunity is worked on, Product details, Notes, Attachments, Quotes, etc., can be added to the Opportunity Details page.

Transfer Lead to No Lead

From the Outstanding Leads page, click on a lead to view its Lead details.

1. Add any activities that occurred when following up on the lead by clicking the Activities tab at the bottom of the page, then click the **[New]** button.
2. Enter all required information into the Add New Activity form, then click **[Save Activity]** to add it to the lead.
3. If it becomes apparent that the lead is not going anywhere, click the **Stage** drop-down menu and select No Lead.
4. Click the **[Save Lead]** button transfer the lead to No Lead.

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NOTE: Once a lead has been transferred to No Lead it cannot be edited. If the lead needs to be reopened, a new lead must be created.

Add New Opportunity

Opportunities can be created without having to go through the Lead stage first.

To add a new opportunity:

1. Click the Plus icon at the far right of the top navigation bar, then click the **[Add New Opportunity]** button in the drop-down menu.
2. Select whether this is an Opportunity or a Bid.
3. Enter all required information into the fields in the Add New Opportunity form.
4. Once the opportunity's Division and Type have been specified, you will have the option to enter information into the Product section.
5. Click the **[Save Opportunity]** button.

Edit Opportunity

To edit an opportunity:

1. Select an open opportunity be taken to its Opportunity Details page.
2. Make all necessary changes to the opportunity.
3. Click the **[Save Opportunity]** button at the bottom right of the page.

Opportunity Stages

Stages of completion are assigned according to which stage the deal is currently in.

- **Outstanding:** An opportunity to sell something has been identified and qualified, but the sales rep has not started working on it.

- **Development:** The sales rep has started working on this opportunity, such as gathering requirements from the customer or internal requirements from the dealership. A quote has been started and is in progress.

- **Proposal:** The sales rep has completed a quote and has submitted it to the customer for review. This stage represents outstanding quotes to customers that are still in negotiation, re-quoting stages, or waiting for customer acceptance.

NOTE: If the opportunity is changed to the following stages, the information can no longer be edited and the stage cannot be changed back to previous stage types.

- **Won:** The customer has proceeded with the proposal and will purchase the equipment. When changing to this stage additional information is necessary in order to save the opportunity.

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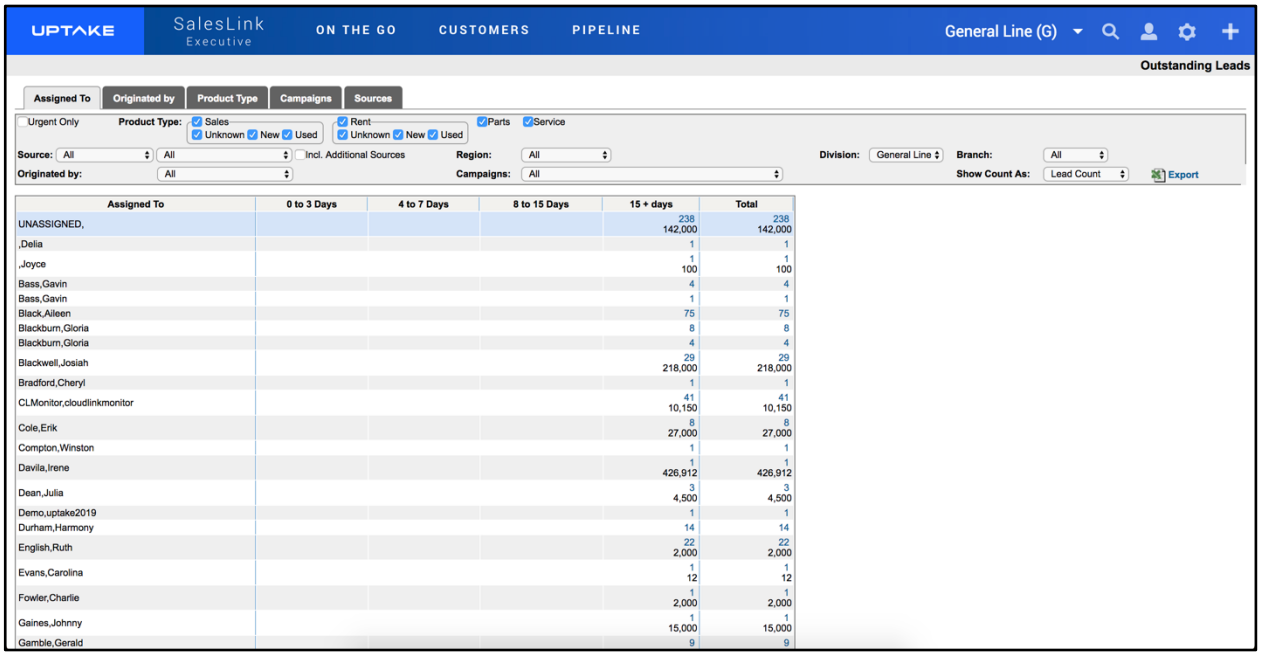
- **Lost:** The customer has decided to go with a competitor. The lost sale page will appear and must be completed to save the opportunity at this stage. This Lost Sales information will appear in certain reports in SalesLink.

- **No Deal:** The customer has decided not to purchase. The only additional information that will be necessary is the reason.

Outstanding Leads

Click the **Outstanding Leads** link under ON THE GO in the top navigation bar. The Outstanding Leads page displays.



This page displays a list of outstanding leads, organized by the person the lead is assigned to. You can also organize the list by Originated by, Product Type, Campaigns, and Sources.

To filter the list, select the fields you want to filter by at the top of the page. The list will automatically update as filters are applied.

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

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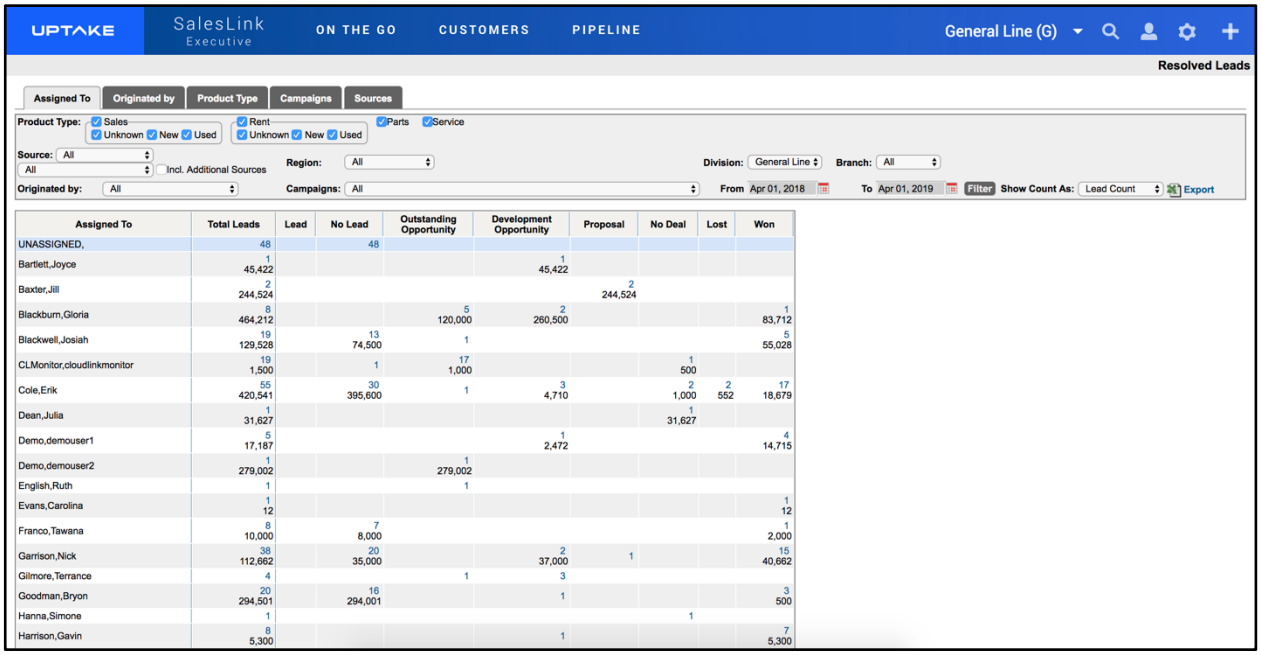
Resolved Leads

Click the **Resolved Leads** link under PIPELINE in the top navigation bar. The Resolved Leads page displays.



Assigned To	Total Leads	Lead	No Lead	Outstanding Opportunity	Development Opportunity	Proposal	No Deal	Lost	Won
UNASSIGNED,	48		48						
Bartlett,Joyce	1 45,422				1 45,422				
Baxter,Jill	2 244,524					2 244,524			
Blackburn,Gloria	8 464,212			5 120,000	2 260,500				1 83,712
Blackwell,Josiah	19 129,528		13 74,500	1					5 55,028
CLMonitor,cloudlinkmonitor	19 1,500		1	17 1,000			1 500		
Cole,Erik	55 420,541		30 395,600	1	3 4,710		2 1,000	2 552	17 18,679
Dean,Julia	1 31,627						1 31,627		
Demo,demouser1	5 17,187				1 2,472				4 14,715
Demo,demouser2	1 279,002			1 279,002					
English,Ruth	1			1					
Evans,Carolina	1 12								1 12
Franco,Tawana	8 10,000		7 8,000						1 2,000
Garrison,Nick	38 112,662		20 35,000		2 37,000	1			15 40,662
Gilmore,Terrance	4			1	3				
Goodman,Bryon	20 294,501		16 294,001		1				3 500
Hanna,Simone	1						1		
Harrison,Gavin	8 5,300				1				7 5,300

This page displays a list of all resolved leads, organized by the person the lead was assigned to. You can also organize the list by Originated by, Product Type, Campaigns, and Sources.

To filter the list:

1. Select which fields you want to filter by.
2. Select date range.
3. Click the **[Filter]** button.

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

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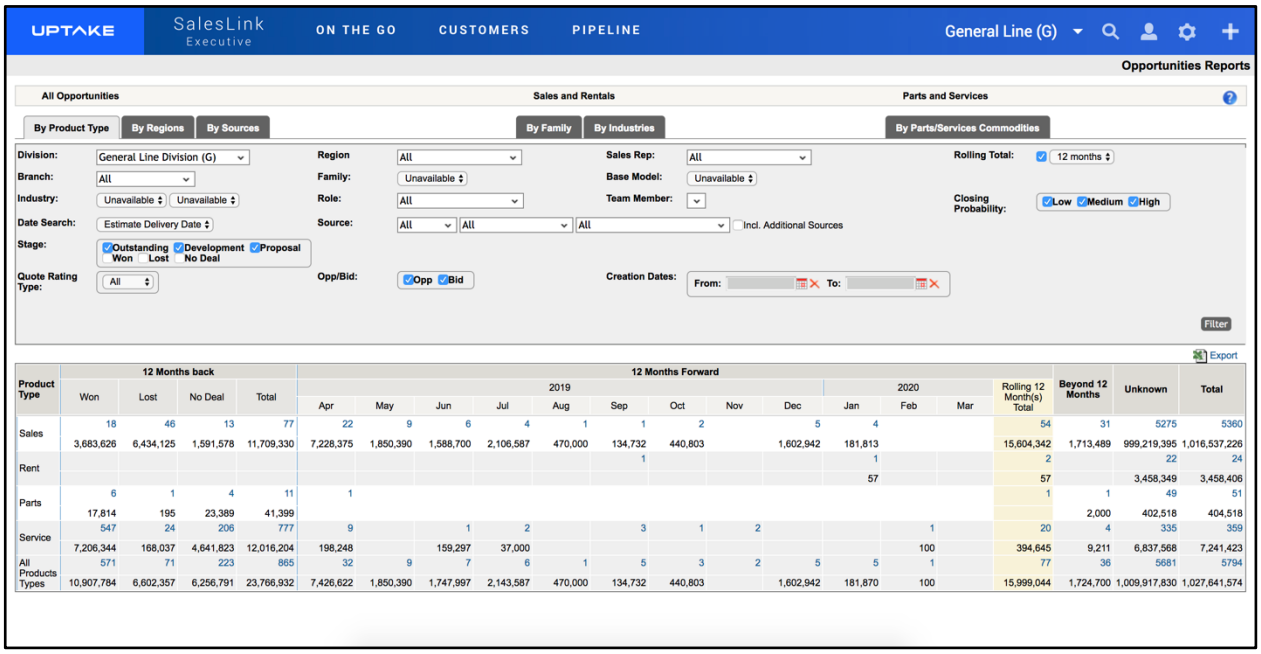
Opportunities Reports

Generate reports about your opportunities by clicking the **Opportunities by Product Type** link under PIPELINE in the top navigation bar. A table of past and future opportunities organized by Product Type is displayed.



Click on the tabs at the top of the screen to organize your opportunities by different categories. The table will automatically update as each tab is selected.

To filter the table:

1. Select the fields you want to filter by.
2. Select a date range to filter by.
3. Click the **[Filter]** button.

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

Click the Question (?) icon at the top right of the page for more information about filter options and results.

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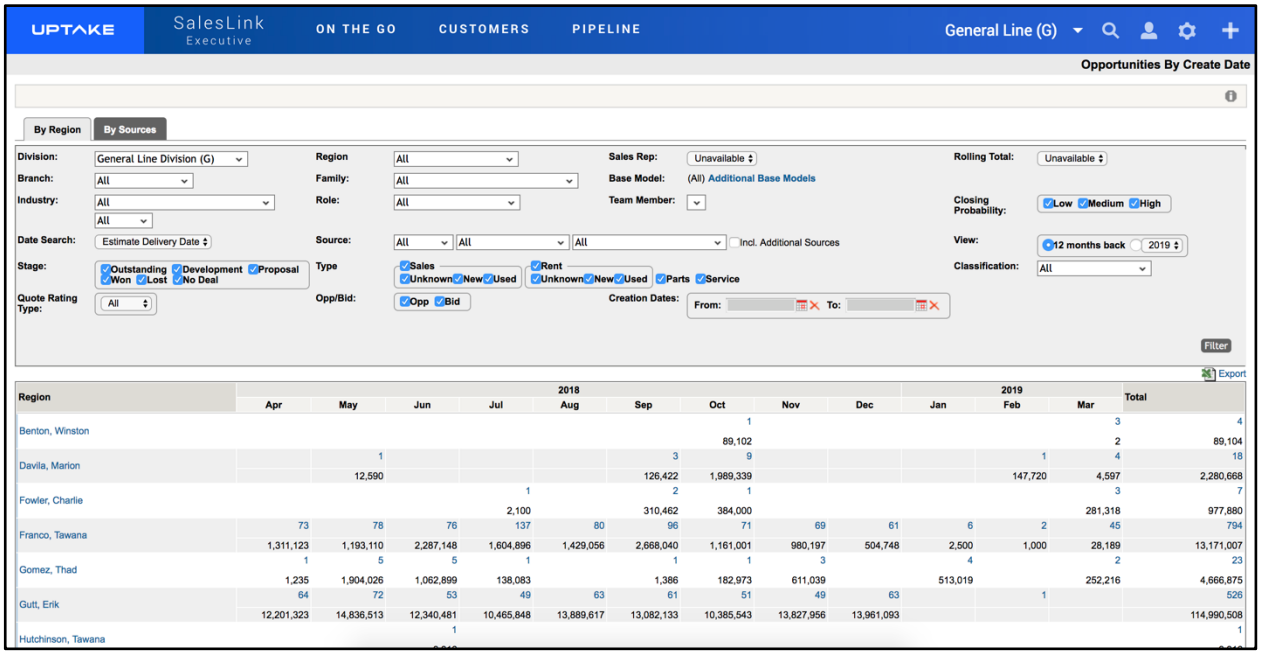
Opportunities by Create Date

Click the **Opportunities by Create Date** link under PIPELINE in the top navigation bar. The Opportunities by Create Date page displays.



This page displays a table of current and past opportunities organized by their Region. You can also organize the table by Source using the tabs at the top of the page.

To filter the table:

1. Select the fields you want to filter by.
2. Select a date range to filter by.
3. Click the **[Filter]** button.

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

Click the Information (i) icon at the top right of the page for more information about filter options and results.

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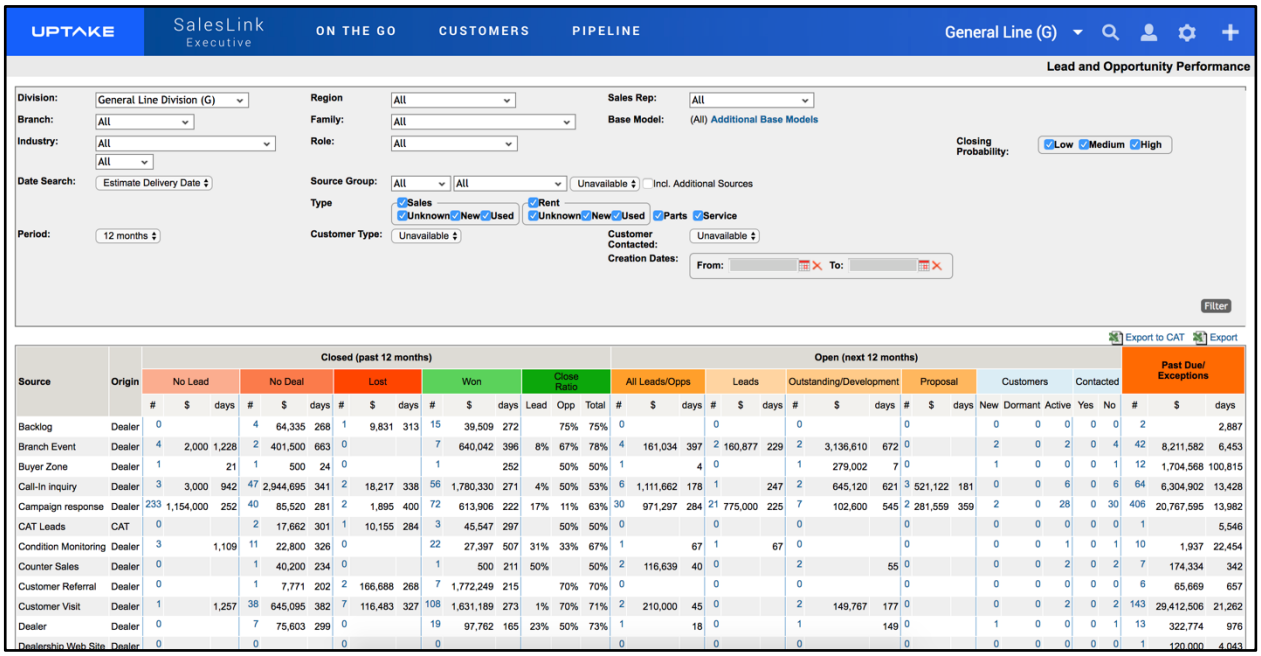
Lead and Opportunity Performance

Generate a Lead and Opportunity Performance Report by clicking the **Lead and Opportunity Performance** link under PIPELINE in the top navigation bar. A table of your Closed and Open leads and Opportunities displays, organized by Source.



To filter the table:

1. Select the fields you want to filter by.
2. Select a date range to filter by.
3. Click the **[Filter]** button.

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

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

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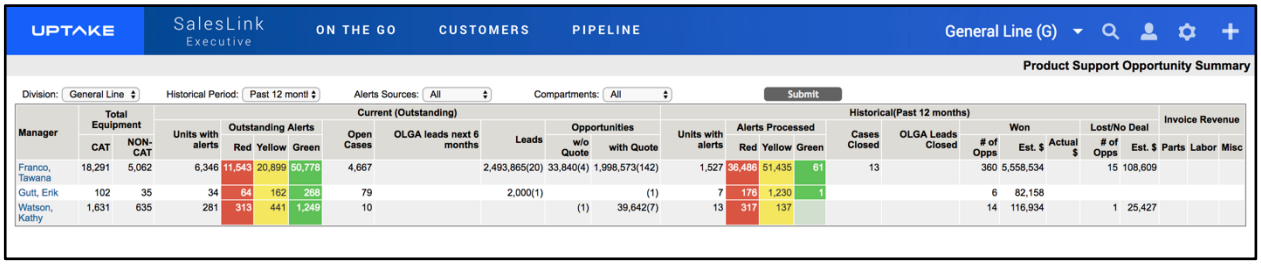
Product Support Opportunity Summary

Click the **Product Support Opportunity Summary** link under PIPELINE in the top navigation bar. The Product Support Opportunity Summary page displays.



Manager	Total Equipment		Current (Outstanding)								Historical(Past 12 months)									Invoice Revenue		
			Units with alerts	Outstanding Alerts			Open Cases	OLGA leads next 6 months	Leads	Opportunities		Units with alerts	Alerts Processed			Cases Closed	OLGA Leads Closed	Won			Lost/No Deal		
	CAT	NON-CAT		Red	Yellow	Green				w/o Quote	with Quote		Red	Yellow	Green			# of Opps	Est. $	Actual $	# of Opps	Est. $	Parts	Labor	Misc
Franco, Tawana	18,291	5,062	6,346	11,543	20,899	50,778	4,667		2,493,865(20)	33,840(4)	1,998,573(142)	1,527	36,486	51,435	61	13		360	5,558,534		15	108,609			
Gutt, Erik	102	35	34	64	162	266	79		2,000(1)		(1)	7	176	1,230	1			6	82,158						
Watson, Kathy	1,631	635	281	313	441	1,249	10			(1)	39,642(7)	13	317	137				14	116,934		1	25,427			

This page displays a detailed table of current and past product support opportunities, organized by manager. Filter the table by selecting from the drop-down menus at the top of the page, then clicking the **[Submit]** button.

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Territory

Add New Customer

To add a new customer:

1. Click the Plus icon at the far right of the top navigation bar.
2. Select **[Add New Customer]** from the drop-down menu.
3. Enter all required information into the Add New Customer form.
4. Click **[Submit]** to create the new customer.

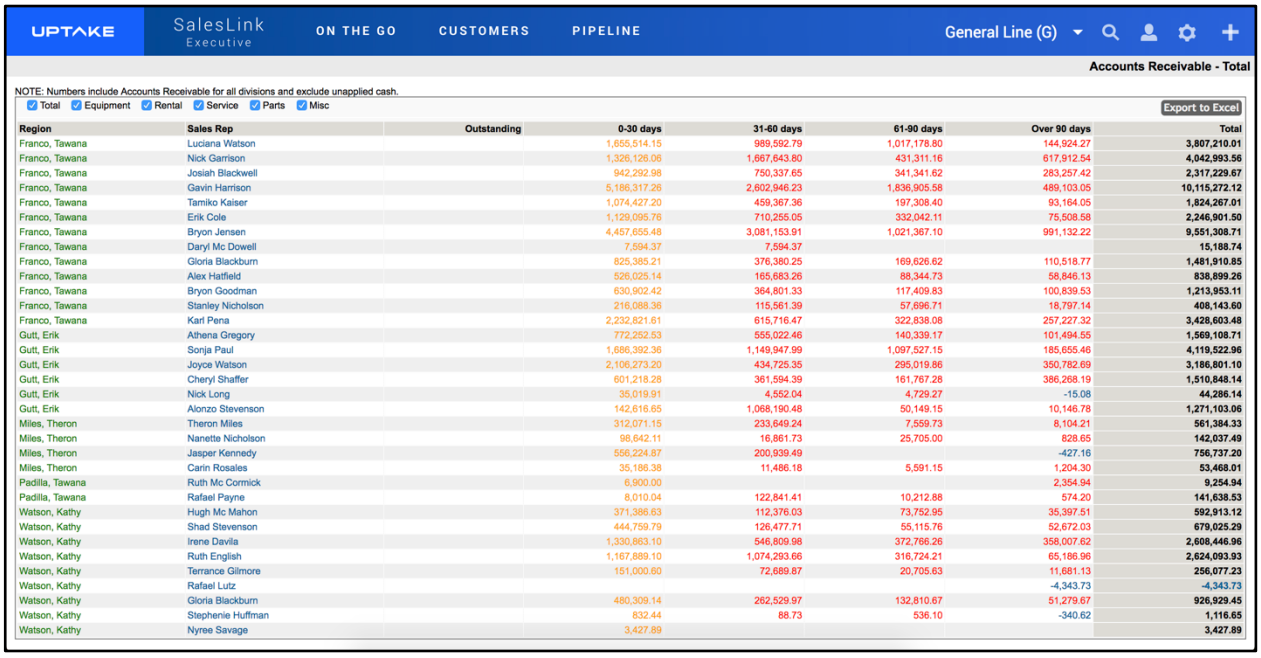
Add New Prospect

To add a new prospect:

1. Click the Plus icon at the far right of the top navigation bar.
2. Select **[Add New Prospect]** from the drop-down menu.
3. Enter all required information into the Add New Prospect form.
4. Click **[Submit]** to create the new prospect.

Accounts Receivable

Click the **Accounts Receivable** link under ON THE GO in the top navigation bar. The Accounts Receivable page displays.



Region	Sales Rep	Outstanding	0-30 days	31-60 days	61-90 days	Over 90 days	Total
Franco, Tawana	Luciana Watson		1,655,514.15	989,592.79	1,017,178.80	144,924.27	3,807,210.01
Franco, Tawana	Nick Garrison		1,326,126.06	1,667,643.80	431,311.16	617,912.54	4,042,993.56
Franco, Tawana	Josiah Blackwell		942,292.98	750,337.65	341,341.62	283,257.42	2,317,229.67
Franco, Tawana	Gavin Harrison		5,186,317.26	2,602,946.23	1,836,905.58	489,103.05	10,115,272.12
Franco, Tawana	Tamiko Kaiser		1,074,427.20	459,367.36	197,308.40	93,164.05	1,824,267.01
Franco, Tawana	Erik Cole		1,129,095.76	710,255.05	332,042.11	75,508.58	2,246,901.50
Franco, Tawana	Bryon Jensen		4,457,655.48	3,081,153.91	1,021,367.10	991,132.22	9,551,308.71
Franco, Tawana	Daryl Mc Dowell		7,594.37	7,594.37			15,188.74
Franco, Tawana	Gloria Blackburn		825,385.21	376,380.25	169,626.62	110,518.77	1,481,910.85
Franco, Tawana	Alex Hatfield		526,025.14	165,683.26	88,344.73	58,846.13	838,899.26
Franco, Tawana	Bryon Goodman		630,902.42	364,801.33	117,409.83	100,839.53	1,213,953.11
Franco, Tawana	Stanley Nicholson		216,088.36	115,561.39	57,696.71	18,797.14	408,143.60
Franco, Tawana	Karl Pena		2,232,821.61	615,716.47	322,838.08	257,227.32	3,428,603.48
Gutt, Erik	Athena Gregory		772,252.53	555,022.46	140,339.17	101,494.55	1,569,108.71
Gutt, Erik	Sonja Paul		1,686,392.36	1,149,947.99	1,097,527.15	185,655.46	4,119,522.96
Gutt, Erik	Joyce Watson		2,106,273.20	434,725.35	295,019.86	350,782.69	3,186,801.10
Gutt, Erik	Cheryl Shaffer		601,218.28	361,594.39	161,767.28	386,268.19	1,510,848.14
Gutt, Erik	Nick Long		35,019.91	4,552.04	4,729.27	-15.08	44,286.14
Gutt, Erik	Alonzo Stevenson		142,616.65	1,068,190.48	50,149.15	10,146.78	1,271,103.06
Miles, Theron	Theron Miles		312,071.15	233,849.24	7,559.73	8,104.21	561,384.33
Miles, Theron	Nanette Nicholson		98,642.11	16,861.73	25,705.00	828.65	142,037.49
Miles, Theron	Jasper Kennedy		556,224.87	200,939.49		-427.16	756,737.20
Miles, Theron	Carin Rosales		35,186.38	11,486.18	5,591.15	1,204.30	53,468.01
Padilla, Tawana	Ruth Mc Cormick		6,900.00			2,354.94	9,254.94
Padilla, Tawana	Rafael Payne		8,010.04	122,841.41	10,212.88	574.20	141,638.53
Watson, Kathy	Hugh Mc Mahon		371,386.63	112,376.03	73,752.95	35,397.51	592,913.12
Watson, Kathy	Shad Stevenson		444,759.79	126,477.71	55,115.76	52,672.03	679,025.29
Watson, Kathy	Irene Davila		1,330,863.10	546,809.98	372,766.26	358,007.62	2,608,446.96
Watson, Kathy	Ruth English		1,167,889.10	1,074,293.66	316,724.21	65,186.96	2,624,093.93
Watson, Kathy	Terrance Gilmore		151,000.60	72,689.87	20,705.63	11,681.13	256,077.23
Watson, Kathy	Rafael Lutz					-4,343.73	-4,343.73
Watson, Kathy	Gloria Blackburn		480,309.14	262,529.97	132,810.67	51,279.67	926,929.45
Watson, Kathy	Stephenie Huffman		832.44	88.73	536.10	-340.62	1,116.65
Watson, Kathy	Nyree Savage		3,427.89				3,427.89

This page displays detailed accounts receivable information for all of your customers, organized by region and sales rep.

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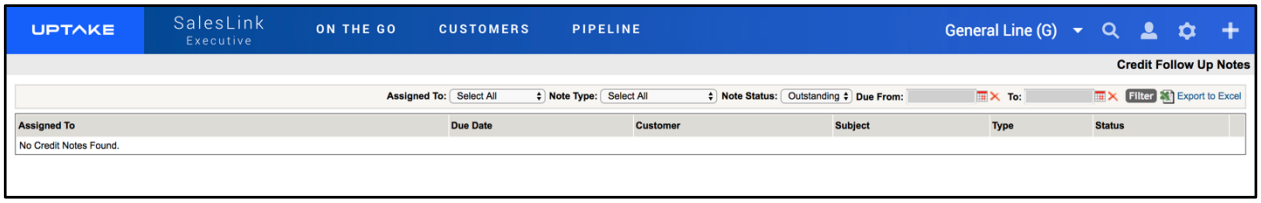
Filter what accounts receivable information is displayed by selecting or deselecting the category checkboxes at the top left of the page. The table will automatically update as each filter selection is made.

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

NOTE: The numbers displayed exclude unapplied cash.

A/R Notes List

Click the **A/R Notes List** link under ON THE GO in the top navigation bar. The Credit Follow Up Notes page displays.



This page displays a detailed list of current credit follow up notes, organized by the person they're assigned to.

To filter the table:

1. Select the fields you want to filter by.
2. Select a date range to filter by.
3. Click the **[Filter]** button.

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

My Requests

Requests are changes to a customer's information, including adding equipment, assigning a customer, adding influencers, etc., that are sent to their assigned SalesLink Administrators (or branch administrators or gatekeepers) to make the change in DBS or in SalesLink.

Click the **My Requests** link under ON THE GO in the top navigation bar. The My Requests page displays.

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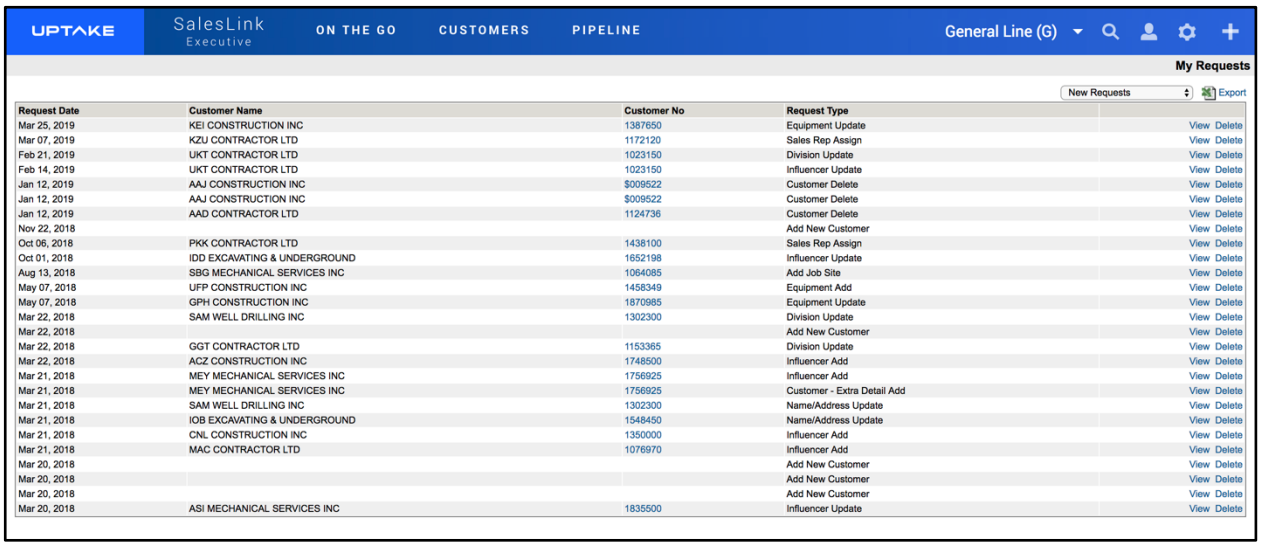


Request Date	Customer Name	Customer No	Request Type	
Mar 25, 2019	KEI CONSTRUCTION INC	1387650	Equipment Update	View Delete
Mar 07, 2019	KZU CONTRACTOR LTD	1172120	Sales Rep Assign	View Delete
Feb 21, 2019	UKT CONTRACTOR LTD	1023150	Division Update	View Delete
Feb 14, 2019	UKT CONTRACTOR LTD	1023150	Influencer Update	View Delete
Jan 12, 2019	AAJ CONSTRUCTION INC	$009522	Customer Delete	View Delete
Jan 12, 2019	AAJ CONSTRUCTION INC	$009522	Customer Delete	View Delete
Jan 12, 2019	AAD CONTRACTOR LTD	1124736	Customer Delete	View Delete
Nov 22, 2018			Add New Customer	View Delete
Oct 06, 2018	PKK CONTRACTOR LTD	1438100	Sales Rep Assign	View Delete
Oct 01, 2018	IDD EXCAVATING & UNDERGROUND	1652198	Influencer Update	View Delete
Aug 13, 2018	SBG MECHANICAL SERVICES INC	1064085	Add Job Site	View Delete
May 07, 2018	UFP CONSTRUCTION INC	1458349	Equipment Add	View Delete
May 07, 2018	GPH CONSTRUCTION INC	1870985	Equipment Update	View Delete
Mar 22, 2018	SAM WELL DRILLING INC	1302300	Division Update	View Delete
Mar 22, 2018			Add New Customer	View Delete
Mar 22, 2018	GGT CONTRACTOR LTD	1153365	Division Update	View Delete
Mar 22, 2018	ACZ CONSTRUCTION INC	1748500	Influencer Add	View Delete
Mar 21, 2018	MEY MECHANICAL SERVICES INC	1756925	Influencer Add	View Delete
Mar 21, 2018	MEY MECHANICAL SERVICES INC	1756925	Customer - Extra Detail Add	View Delete
Mar 21, 2018	SAM WELL DRILLING INC	1302300	Name/Address Update	View Delete
Mar 21, 2018	IOB EXCAVATING & UNDERGROUND	1548450	Name/Address Update	View Delete
Mar 21, 2018	CNL CONSTRUCTION INC	1350000	Influencer Add	View Delete
Mar 21, 2018	MAC CONTRACTOR LTD	1076970	Influencer Add	View Delete
Mar 20, 2018			Add New Customer	View Delete
Mar 20, 2018			Add New Customer	View Delete
Mar 20, 2018			Add New Customer	View Delete
Mar 20, 2018	ASI MECHANICAL SERVICES INC	1835500	Influencer Update	View Delete

This page displays a table detailing all open requests, organized by Date, Customer Name, Customer Number, and Request Type. Filter the table using the drop-down menu at the top of the page.

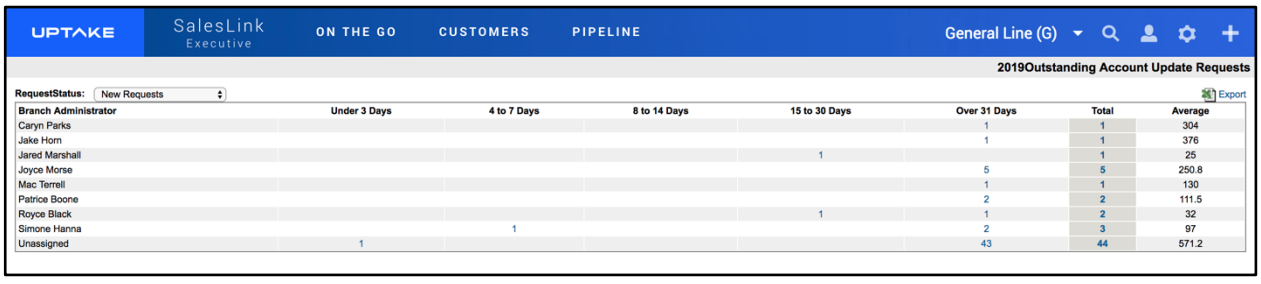
Click the **[View]** button to view a request's details.

Click the **[Delete]** button to delete a request.

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

Outstanding Requests

Click the **Outstanding Requests** link under ON THE GO in the top navigation bar. The Outstanding Account Update Requests page displays.



Branch Administrator	Under 3 Days	4 to 7 Days	8 to 14 Days	15 to 30 Days	Over 31 Days	Total	Average
Caryn Parks					1	1	304
Jake Horn					1	1	376
Jared Marshall				1		1	25
Joyce Morse					5	5	250.8
Mac Terrell					1	1	130
Patrice Boone					2	2	111.5
Royce Black				1	1	2	32
Simone Hanna		1			2	3	97
Unassigned	1				43	44	571.2

This page displays all your outstanding account update requests, organized by Branch Administrator. Filter the table using the Request Status drop-down menu at the top left of the page.

Click on a number in the table to view details regarding those requests.

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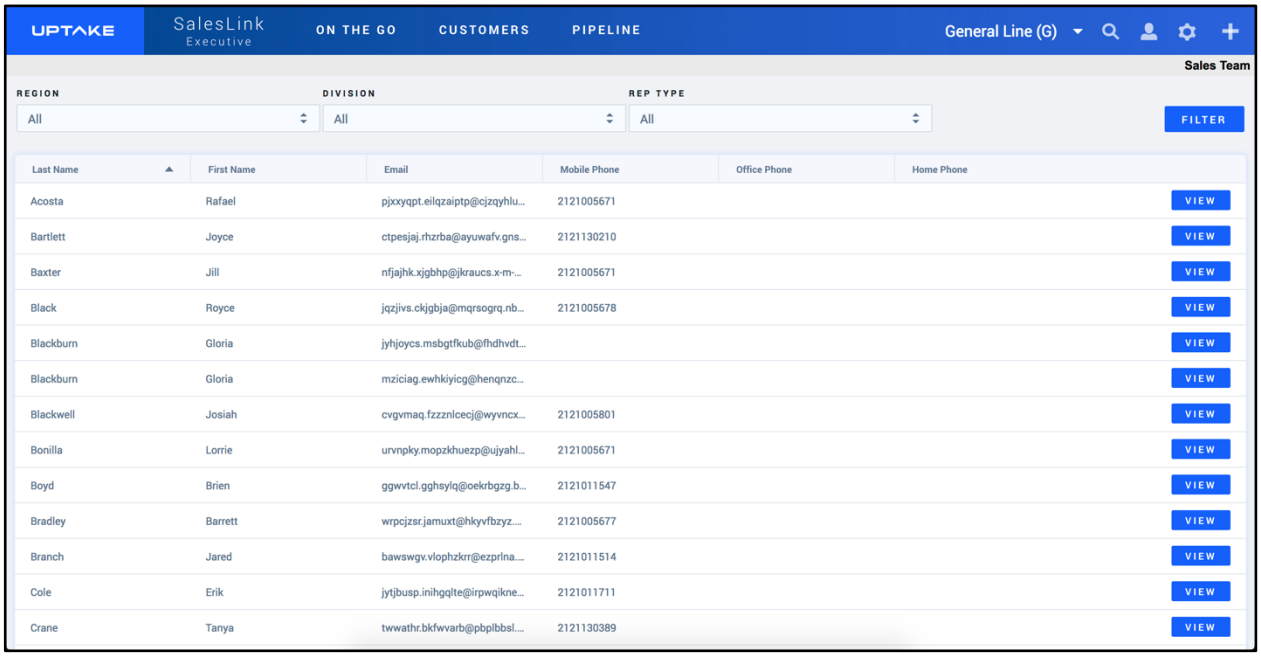
Export the table into an Excel spreadsheet by clicking the **[Export]** button at the top right of the page.

Sales Team

Click the **Sales Team** link under ON THE GO in the top navigation bar. The Sales Team page displays.



This page displays details regarding each of your sales reps. Click the **[VIEW]** button to view details about a specific rep.

To filter the table:

1. Use the drop-down menus at the top of the page to select a Region, Division, or Rep Type.
2. Click the **[Filter]** button.

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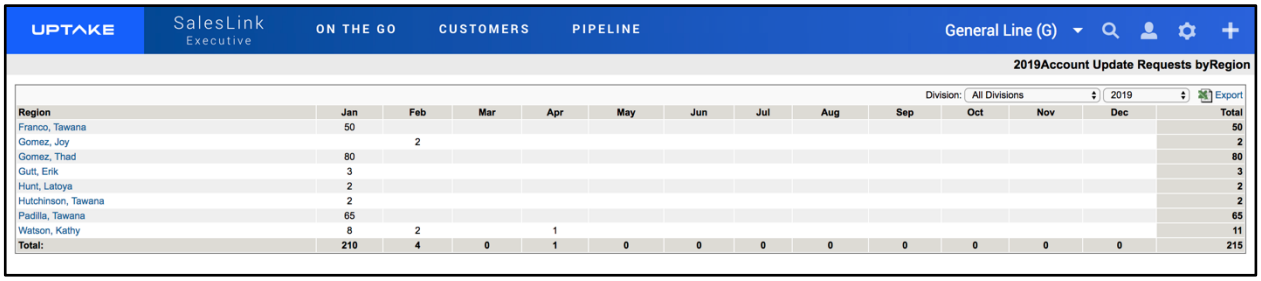
Request History

Click the **Request History** link under CUSTOMERS in the top navigation bar. The Request History page displays.

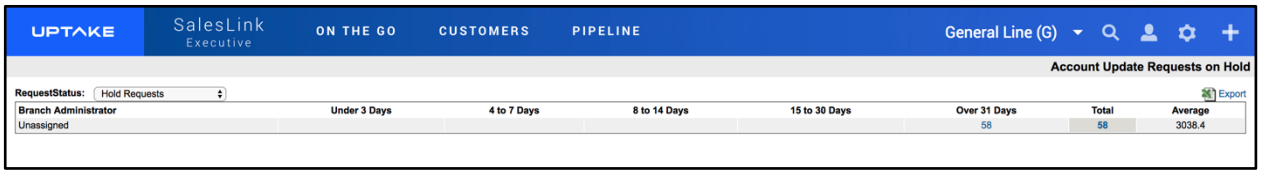


This page displays a table of past requests, organized by Region and Month. Use the Division and Year drop-down menus at the top of the table to switch the division and year the table displays.

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

Change Requests

Click the **Change Requests** link under CUSTOMERS in the top navigation bar. The Account Update Requests on Hold page displays.



This page displays a table of account update requests that are currently on hold, organized by Branch Administrator. Click on a number in the table to view details regarding those requests.

Filter the table using the Request Status drop-down menu at the top left of the page.

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

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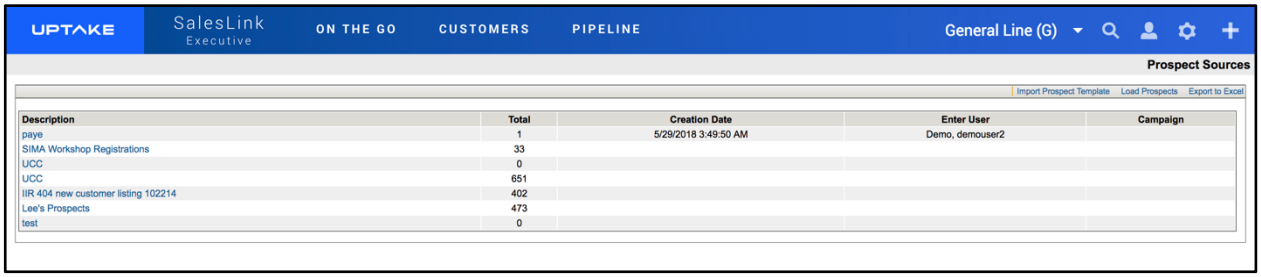
Prospect Sources

Click the **Prospect Sources** link under CUSTOMERS in the top navigation bar. The Prospect Sources page displays.



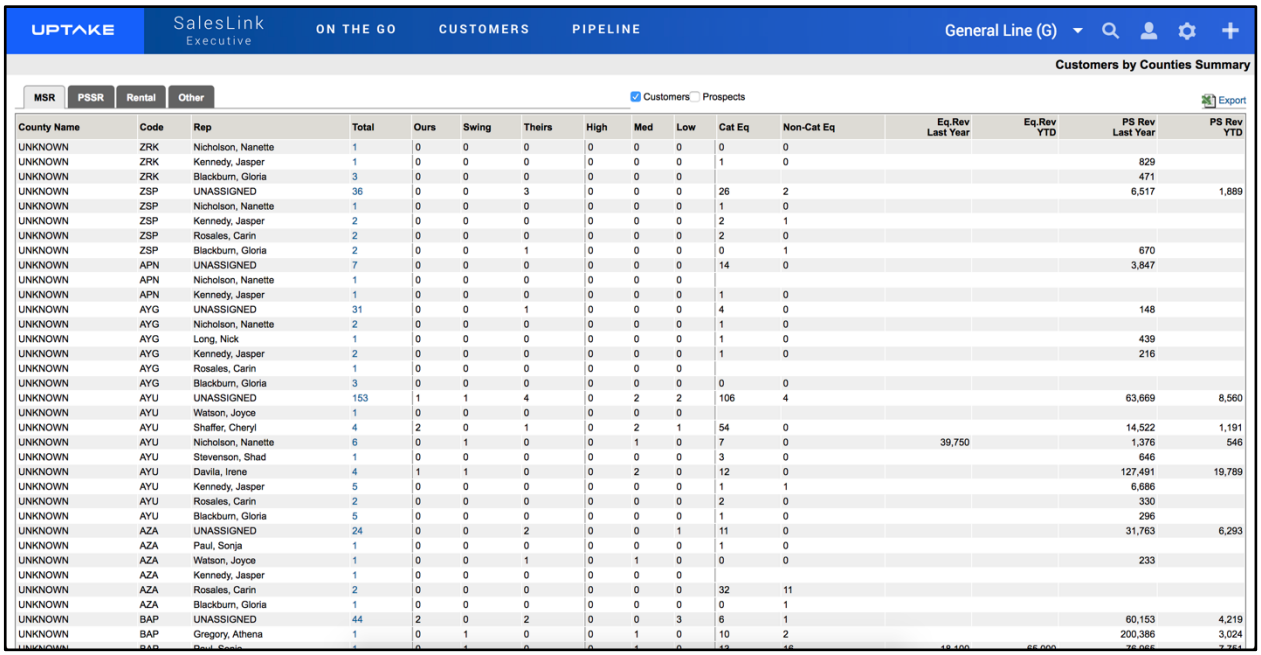
Description	Total	Creation Date	Enter User	Campaign
paye	1	5/29/2018 3:49:50 AM	Demo, demouser2	
SIMA Workshop Registrations	33			
UCC	0			
UCC	651			
IIR 404 new customer listing 102214	402			
Lee's Prospects	473			
test	0			

This page displays a table of your current prospect sources. Click the **[Import Prospect Template]** button to download an Excel prospect template to your computer. Enter any information into the template, then click the **[Load Prospects]** button to upload your file.

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

Customers by Counties

Click the **Customers by Counties** link under CUSTOMERS in the top navigation bar. The Customers by Counties Summary page displays.



County Name	Code	Rep	Total	Ours	Swing	Theirs	High	Med	Low	Cat Eq	Non-Cat Eq	Eq.Rev Last Year	Eq.Rev YTD	PS Rev Last Year	PS Rev YTD
UNKNOWN	ZRK	Nicholson, Nanette	1	0	0	0	0	0	0	0	0				
UNKNOWN	ZRK	Kennedy, Jasper	1	0	0	0	0	0	0	1	0			829	
UNKNOWN	ZRK	Blackburn, Gloria	3	0	0	0	0	0	0					471	
UNKNOWN	ZSP	UNASSIGNED	36	0	0	3	0	0	0	26	2			6,517	1,889
UNKNOWN	ZSP	Nicholson, Nanette	1	0	0	0	0	0	0	1	0				
UNKNOWN	ZSP	Kennedy, Jasper	2	0	0	0	0	0	0	2	1				
UNKNOWN	ZSP	Rosales, Carin	2	0	0	0	0	0	0	2	0				
UNKNOWN	ZSP	Blackburn, Gloria	2	0	0	1	0	0	0	0	1			670	
UNKNOWN	APN	UNASSIGNED	7	0	0	0	0	0	0	14	0			3,847	
UNKNOWN	APN	Nicholson, Nanette	1	0	0	0	0	0	0						
UNKNOWN	APN	Kennedy, Jasper	1	0	0	0	0	0	0	1	0				
UNKNOWN	AYG	UNASSIGNED	31	0	0	1	0	0	0	4	0			148	
UNKNOWN	AYG	Nicholson, Nanette	2	0	0	0	0	0	0	1	0				
UNKNOWN	AYG	Long, Nick	1	0	0	0	0	0	0	1	0			439	
UNKNOWN	AYG	Kennedy, Jasper	2	0	0	0	0	0	0	1	0			216	
UNKNOWN	AYG	Rosales, Carin	1	0	0	0	0	0	0						
UNKNOWN	AYG	Blackburn, Gloria	3	0	0	0	0	0	0	0	0				
UNKNOWN	AYU	UNASSIGNED	153	1	1	4	0	2	2	106	4			63,669	8,560
UNKNOWN	AYU	Watson, Joyce	1	0	0	0	0	0	0						
UNKNOWN	AYU	Shaffer, Cheryl	4	2	0	1	0	2	1	54	0			14,522	1,191
UNKNOWN	AYU	Nicholson, Nanette	6	0	1	0	0	1	0	7	0	39,750		1,376	546
UNKNOWN	AYU	Stevenson, Shad	1	0	0	0	0	0	0	3	0			646	
UNKNOWN	AYU	Davila, Irene	4	1	1	0	0	2	0	12	0			127,491	19,789
UNKNOWN	AYU	Kennedy, Jasper	5	0	0	0	0	0	0	1	1			6,686	
UNKNOWN	AYU	Rosales, Carin	2	0	0	0	0	0	0	2	0			330	
UNKNOWN	AYU	Blackburn, Gloria	5	0	0	0	0	0	0	1	0			296	
UNKNOWN	AZA	UNASSIGNED	24	0	0	2	0	0	1	11	0			31,763	6,293
UNKNOWN	AZA	Paul, Sonja	1	0	0	0	0	0	0	1	0				
UNKNOWN	AZA	Watson, Joyce	1	0	0	1	0	1	0	0	0			233	
UNKNOWN	AZA	Kennedy, Jasper	1	0	0	0	0	0	0						
UNKNOWN	AZA	Rosales, Carin	2	0	0	0	0	0	0	32	11				
UNKNOWN	AZA	Blackburn, Gloria	1	0	0	0	0	0	0	0	1				
UNKNOWN	BAP	UNASSIGNED	44	2	0	2	0	0	3	6	1			60,153	4,219
UNKNOWN	BAP	Gregory, Athena	1	0	1	0	0	1	0	10	2			200,386	3,024

This page displays a table of current customer revenue details organized by county. Use the tabs at the top left of the page to switch between MSR, PSSR, Rental, and Other.

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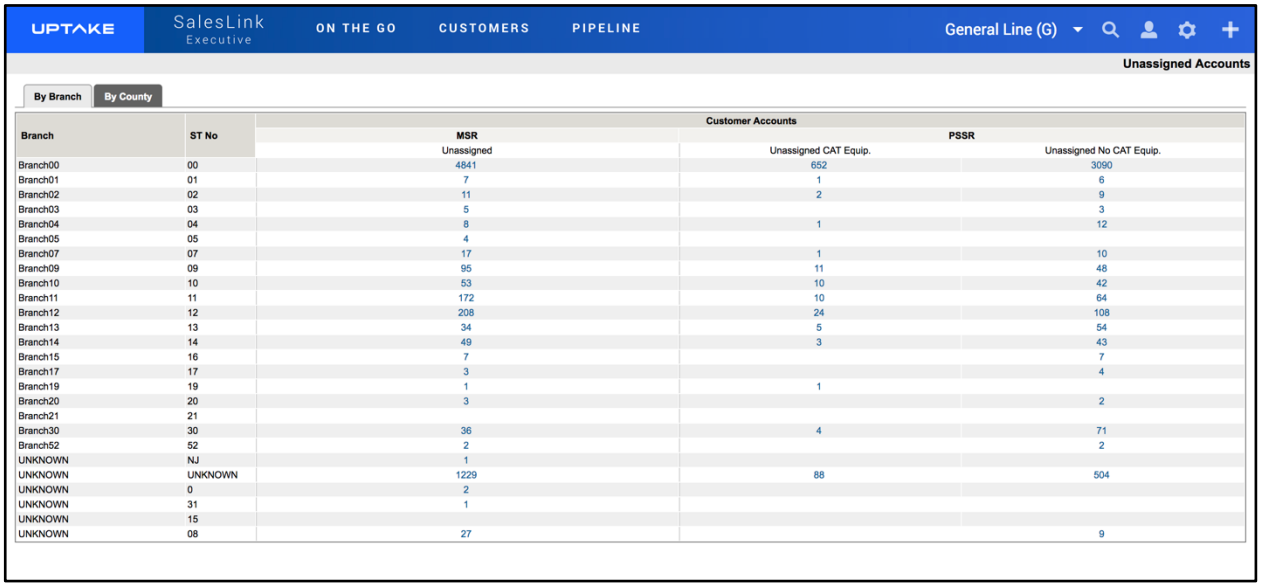
Click the **Prospects** checkbox to view prospective customers in the table.

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

Unassigned Accounts

Click the **Unassigned Accounts** link under CUSTOMERS in the top navigation bar. The Unassigned Accounts page displays.



Branch	ST No	Customer Accounts		
		MSR	PSSR	
		Unassigned	Unassigned CAT Equip.	Unassigned No CAT Equip.
Branch00	00	4841	652	3090
Branch01	01	7	1	6
Branch02	02	11	2	9
Branch03	03	5		3
Branch04	04	8	1	12
Branch05	05	4		
Branch07	07	17	1	10
Branch09	09	95	11	48
Branch10	10	53	10	42
Branch11	11	172	10	64
Branch12	12	208	24	108
Branch13	13	34	5	54
Branch14	14	49	3	43
Branch15	16	7		7
Branch17	17	3		4
Branch19	19	1	1	
Branch20	20	3		2
Branch21	21			
Branch30	30	36	4	71
Branch52	52	2		2
UNKNOWN	NJ	1		
UNKNOWN	UNKNOWN	1229	88	504
UNKNOWN	0	2		
UNKNOWN	31	1		
UNKNOWN	15			
UNKNOWN	08	27		9

This page displays a table of customer accounts that are not currently assigned, organized by MSR and PSSR. Click one of the numbers to view those specific unassigned accounts.

Click on the tabs at the top of the display unassigned accounts by Branch or by County.

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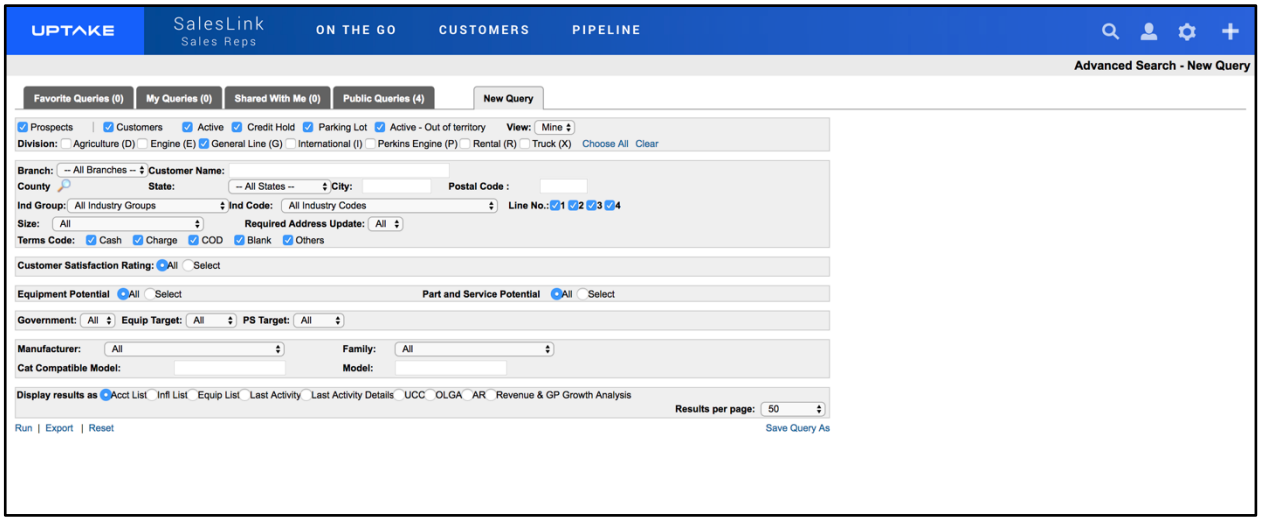
Advanced Search

To run an advanced search for customers or prospects, click the **Advanced Search** link under CUSTOMERS in the top navigation bar. The Advanced Search – New Query page displays.



To run a new query:

5. Select all parameters you want to search by in the New Query form.
6. Select how you want to display your results.
7. Click the **[Run]** button at the bottom left of the page. Your results will display in the manner you selected.
8. Click the **[Reset]** button if you want to return all search parameters to their default settings.

Click the **[Export]** button to export your results into an Excel spreadsheet.

To save a query:

5. Click the **[Save Query As]** button at the bottom right of the page.
6. Enter a Name for your query.
7. If you want to share your query, click the **[Change]** button and select users to share with from the list.
8. Click **[Save]**.

Click the tabs at the top of the page to view Favorite Queries, My Queries, Shared With Me, and Public Queries. Click the **[Run]** button to run one of these queries, or **[Export]** to export the results of a query to an Excel spreadsheet.

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Issues

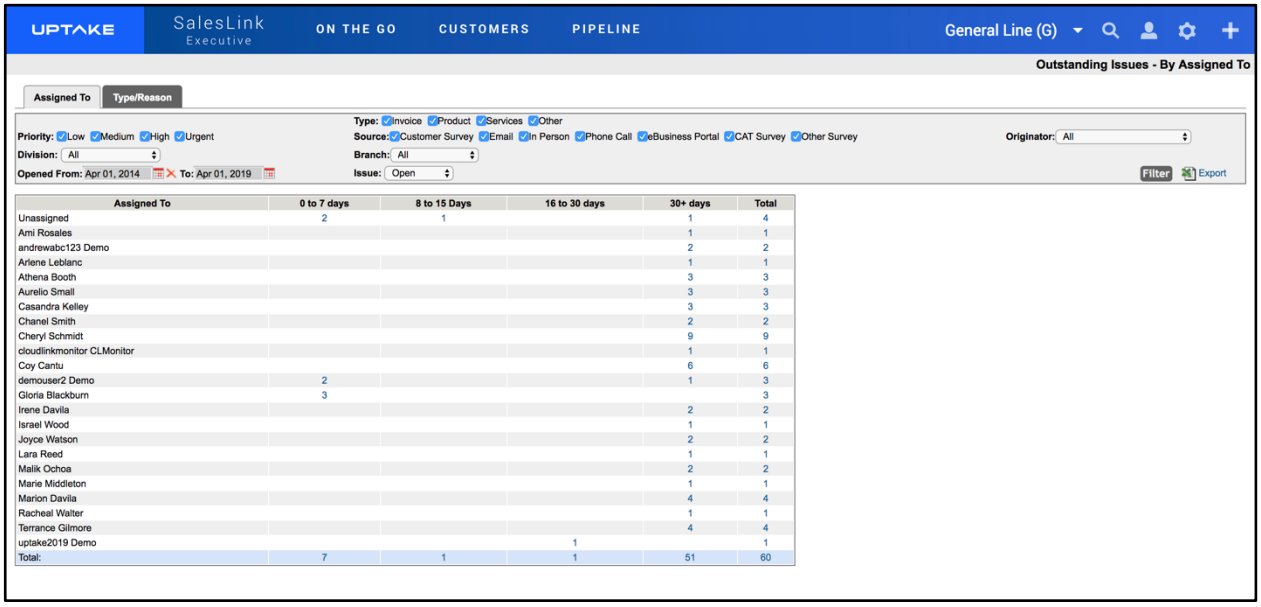
Add New Issue

To add a new issue:

5. Click the Plus icon at the far right of the top navigation bar.
6. Select **[Add New Issue]** from the drop-down menu.
7. Enter all required information regarding the customer and issue details into the Add New Issue form.
8. Click **[Save]** to create the new issue.

My Customer's Issues

Click the **My Customer's Issues** link under ON THE GO in the top navigation bar. The Outstanding Issues page displays.



Assigned To	0 to 7 days	8 to 15 Days	16 to 30 days	30+ days	Total
Unassigned	2	1		1	4
Ami Rosales				1	1
andrewabc123 Demo				2	2
Arlene Leblanc				1	1
Athena Booth				3	3
Aurelio Small				3	3
Casandra Kelley				3	3
Chanel Smith				2	2
Cheryl Schmidt				9	9
cloudlinkmonitor CLMonitor				1	1
Coy Cantu				6	6
demouser2 Demo	2			1	3
Gloria Blackburn	3				3
Irene Davila				2	2
Israel Wood				1	1
Joyce Watson				2	2
Lara Reed				1	1
Malik Ochoa				2	2
Marie Middleton				1	1
Marion Davila				4	4
Racheal Walter				1	1
Terrance Gilmore				4	4
uptake2019 Demo			1		1
Total:	7	1	1	51	60

This page displays a detailed table of all your currently outstanding customer issues. Use the tabs at the top of the page to organize the issues by Assigned To or Type/Reason.

To filter the table:

1. Select the fields you want to filter by at the top of the page.
2. Select a date range to filter by.
3. Click the **[Filter]** button.

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

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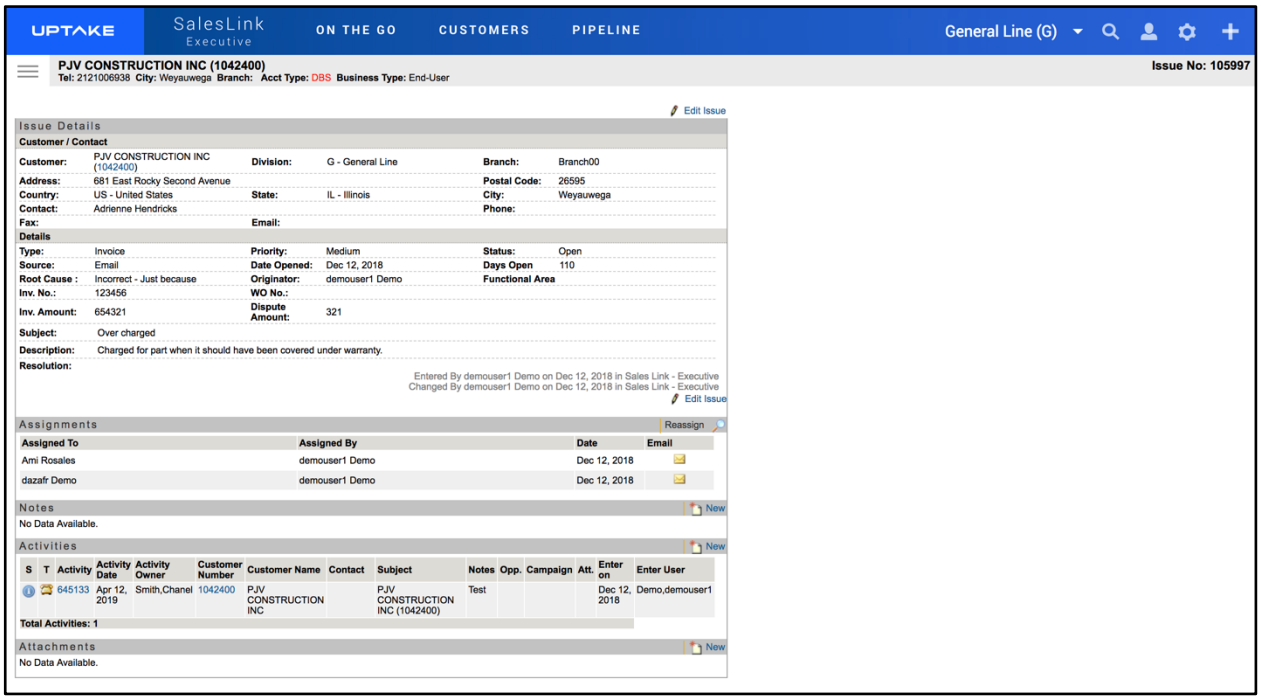
Issue Details

Click on an Issue Number to view its Issue Details page.



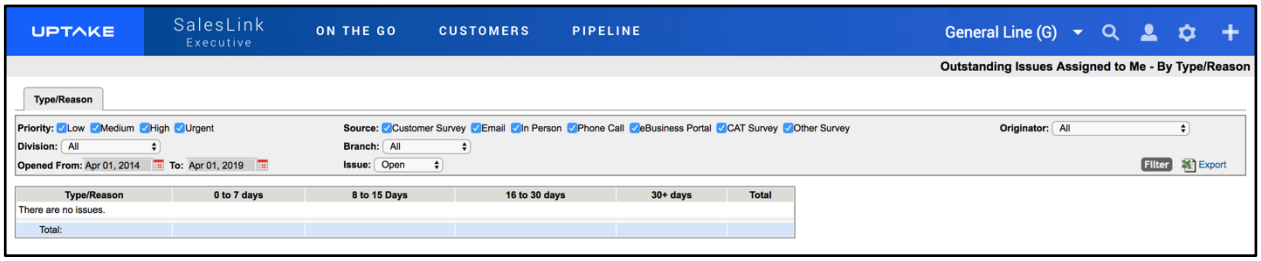
This page displays in-depth information regarding the customer, details about the specific issue, actions taken, etc. Click the **[Edit Issue]** button to edit information about the issue.

Click on the magnifying glass icon to search for a user to assign to the issue.

Click on the **[New]** buttons to add any Notes, Activities, or Attachments to the issue.

Issues Assigned to Me

Click the **Issues Assigned to Me** link under ON THE GO in the top navigation bar. The Outstanding Issues Assigned to Me page displays.



This page displays a detailed table of all the currently outstanding issues that are assigned to you, organized by Type/Reason.

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To filter the table:

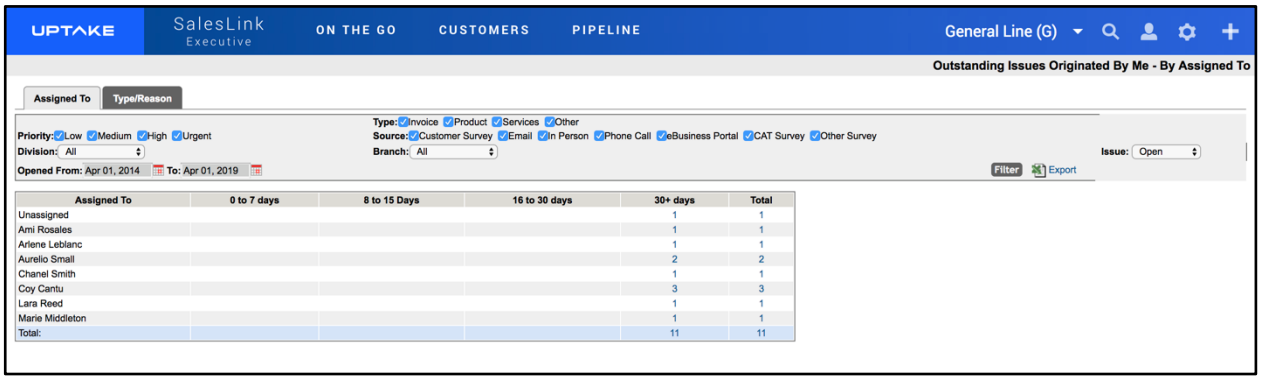
1. Select the fields you want to filter by at the top of the page.
2. Select a date range to filter by.
3. Click the **[Filter]** button.

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

Click on an issue to view its Issue Details.

Issues Originated by Me

Click the **Issues Originated by Me** link under ON THE GO in the top navigation bar. The Outstanding Issues Originated by Me page displays.



This page displays a detailed table of all currently outstanding customer issues that were created by you. Use the tabs at the top of the page to organize the issues by Assigned To or Type/Reason.

To filter the table:

1. Select the fields you want to filter by at the top of the page.
2. Select a date range to filter by.
3. Click the **[Filter]** button.

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

Click on an issue to view its Issue Details.

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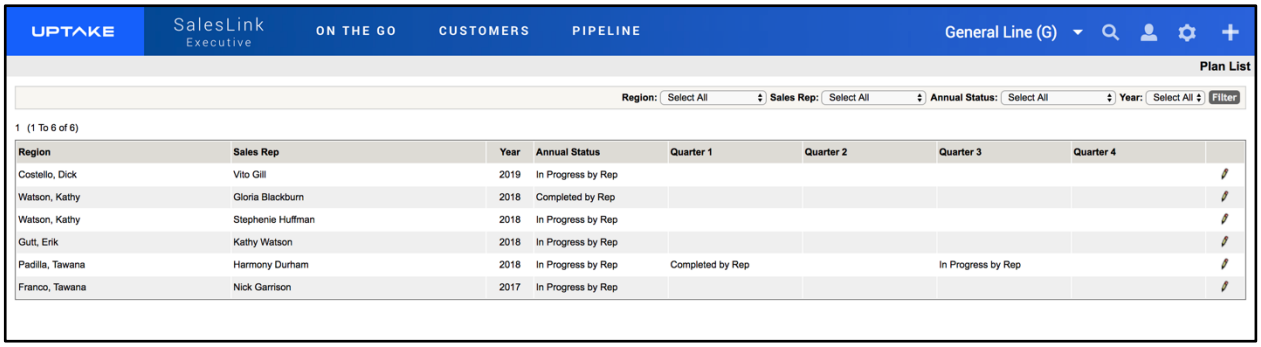
Plans

Territory Plans

Click the **Territory Plans** link under CUSTOMERS in the top navigation bar. The Plan List page displays.



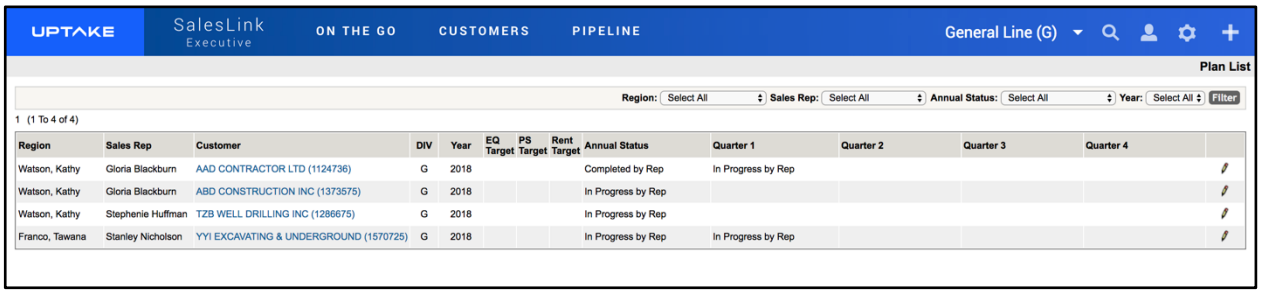
This page displays a detailed table of all current territory plans organized by region. Click on the Pencil icon at the right of the table to view that plan's details.

To filter the table:

1. Select the fields you want to filter by at the top of the page.
2. Select a year to filter by.
3. Click the **[Filter]** button.

Account Plans

Click the **Account Plans** under CUSTOMERS in the top navigation bar. The Plan List page displays.



This page displays a detailed table of all current account plans organized by region. Click on the Pencil icon at the right of the table to view that plan's details.

To filter the table:

1. Select the fields you want to filter by at the top of the page.
2. Select a year to filter by.

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3. Click the **[Filter]** button.

Competitors

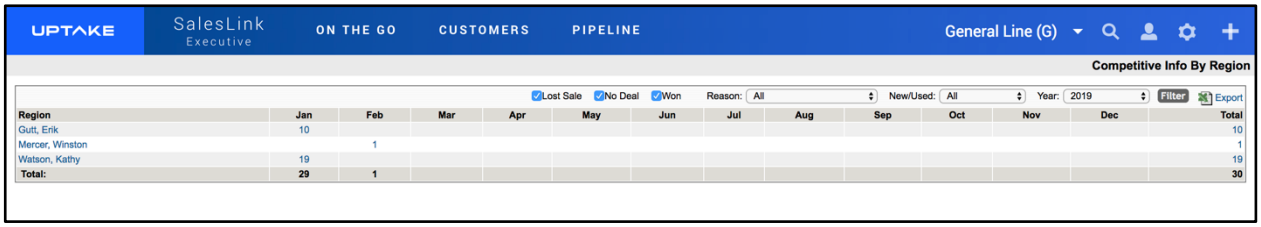
Add COMPARE Report

To add a new Compare Report:

1. Click the Plus icon at the far right of the top navigation bar.
2. Select **[Add COMPARE Report]** from the drop-down menu.
3. Click the magnifying glass icon and search for a customer.
4. Select a division for the customer you want to compare.
5. Enter the information and any comments into the Add New Compare form.
6. Click the **[Add Compare]** button to create the Compare Report.

Competitive Info by Region

Click the **Competitive Info by Region** link under CUSTOMERS in the top navigation bar. The Competitive Info by Region page displays.



This page displays a table of competitive information organized by region. Click on a number to display a list of competitive info details entered during a specific month. From there you can click on an individual customer to view their Customer Profile.

To filter the table:

1. Select the fields you want to filter by at the top of the page.
2. Select a year to filter by.
3. Click the **[Filter]** button.

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

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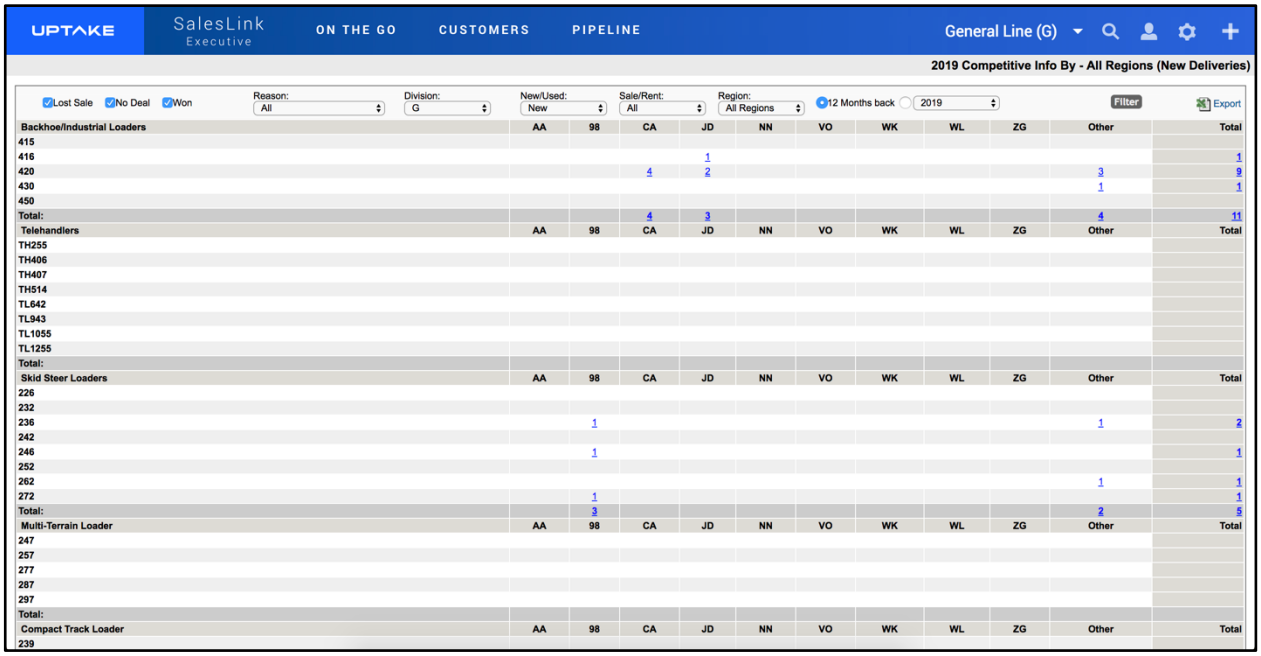
Competitive Info by Model (New Deliveries)

Click the **Competitive Info by Model (New Deliveries)** link under CUSTOMERS in the top navigation bar. The Competitive Info by – All Regions (New Deliveries) page displays.



This page displays a detailed table of all competitive information for new deliveries over the past year across all regions, organized by equipment type.

To filter the table:

1. Select the fields to filter by at the top of the page.
2. Select a year using the **Year** drop-down menu.
3. Click the **[Filter]** button.

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

Click on a number in the table to view details regarding that competitive info.

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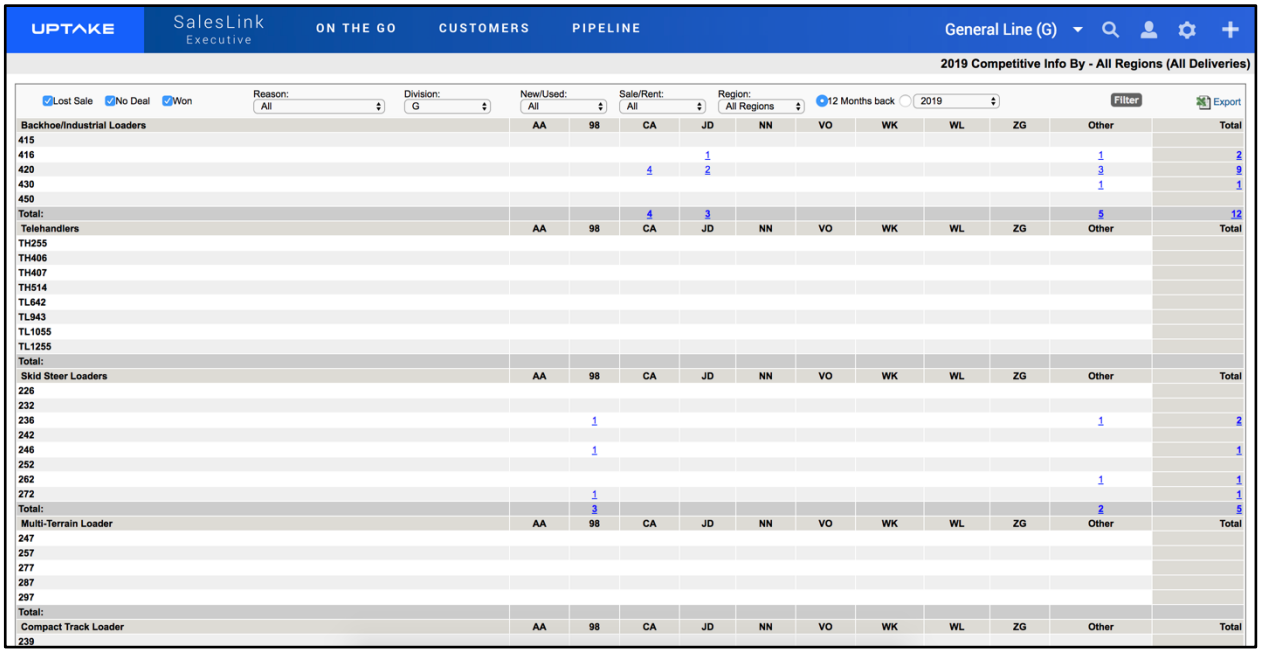
Competitive Info by Model (All)

Click the **Competitive Info by Model (All)** link under CUSTOMERS in the top navigation bar. The Competitive Info by – All Regions (All Deliveries) page displays.



This page displays a detailed table of all competitive information for all deliveries over the past year across all regions, organized by equipment type.

To filter the table:

1. Select the fields to filter by at the top of the page.
2. Select a year using the **Year** drop-down menu.
3. Click the **[Filter]** button.

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

Click on a number in the table to view details regarding that competitive info.

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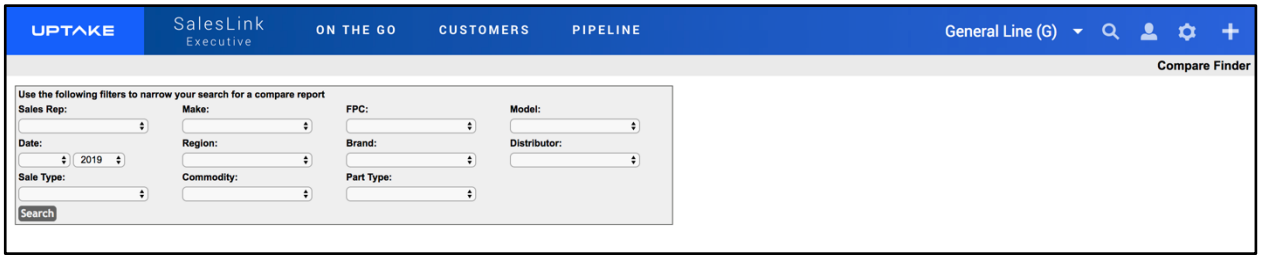
COMPARE Report Finder

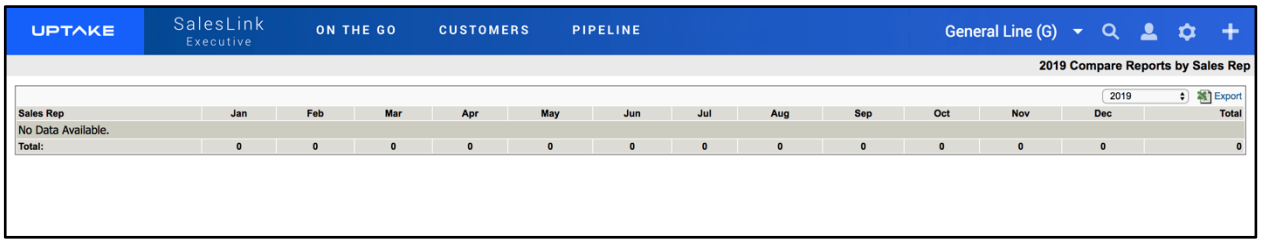
Click the **COMPARE Report Finder** link under CUSTOMERS in the top navigation bar. The Compare Finder page displays.



Use the drop-down menus to search through all Compare Reports. Select the fields you want to search by, then click the **[Search]** button to display a list of Compare Reports matching your request.

COMPARE Report by Sales Rep

Click the **COMPARE Report by Sales Rep** link under CUSTOMERS in the top navigation bar. The Compare Reports by Sales Rep page displays.



This page displays all COMPARE reports generated over the past year, organized by Sales Rep. Click on a number in the table to view details regarding the COMPARE reports generated during a specific month.

Use the Year drop-down menu at the top of the page to switch the year of COMPARE reports displayed in the table.

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

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Insights

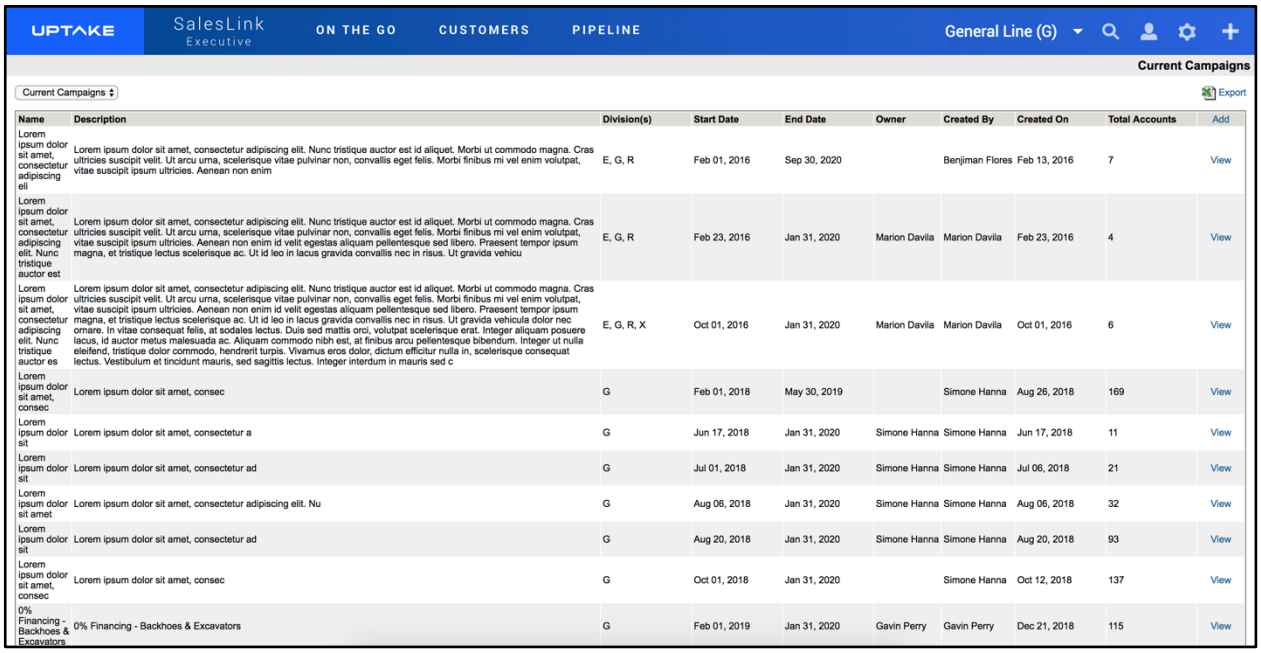
Add New Campaign

To add a new campaign:

1. Click the Plus icon at the far right of the top navigation bar.
2. Click the **[Add New Campaign]** button.
3. Enter all required information into the Campaign Details form.
4. Click **[Save Campaign]**. The campaign will be added to the Current Campaigns page.

Campaigns

Click the **Campaigns** link under PIPELINE in the top navigation bar. The Current Campaigns page displays.



Name	Description	Division(s)	Start Date	End Date	Owner	Created By	Created On	Total Accounts	Add
Lorem ipsum dolor sit amet, consectetur adipiscing eli	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est id aliquet. Morbi ut commodo magna. Cras ultricies suscipit velit. Ut arcu urna, scelerisque vitae pulvinar non, convallis eget felis. Morbi finibus mi vel enim volutpat, vitae suscipit ipsum ultricies. Aenean non enim	E, G, R	Feb 01, 2016	Sep 30, 2020		Benjiman Flores	Feb 13, 2016	7	View
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est id aliquet. Morbi ut commodo magna. Cras ultricies suscipit velit. Ut arcu urna, scelerisque vitae pulvinar non, convallis eget felis. Morbi finibus mi vel enim volutpat, vitae suscipit ipsum ultricies. Aenean non enim id velit egestas aliquam pellentesque sed libero. Praesent tempor ipsum magna, et tristique lectus scelerisque ac. Ut id leo in lacus gravida convallis nec in risus. Ut gravida vehicu	E, G, R	Feb 23, 2016	Jan 31, 2020	Marion Davila	Marion Davila	Feb 23, 2016	4	View
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor es	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est id aliquet. Morbi ut commodo magna. Cras ultricies suscipit velit. Ut arcu urna, scelerisque vitae pulvinar non, convallis eget felis. Morbi finibus mi vel enim volutpat, vitae suscipit ipsum ultricies. Aenean non enim id velit egestas aliquam pellentesque sed libero. Praesent tempor ipsum magna, et tristique lectus scelerisque ac. Ut id leo in lacus gravida convallis nec in risus. Ut gravida vehicula dolor nec ornare. In vitae consequat felis, at sodales lectus. Duis sed mattis orci, volutpat scelerisque erat. Integer aliquam posuere lacus, id auctor metus malesuada ac. Aliquam commodo nibh est, at finibus arcu pellentesque bibendum. Integer ut nulla eleifend, tristique dolor commodo, hendrerit turpis. Vivamus eros dolor, dictum efficitur nulla in, scelerisque consequat lectus. Vestibulum et tincidunt mauris, sed sagittis lectus. Integer interdum in mauris sed c	E, G, R, X	Oct 01, 2016	Jan 31, 2020	Marion Davila	Marion Davila	Oct 01, 2016	6	View
Lorem ipsum dolor sit amet, consec	Lorem ipsum dolor sit amet, consec	G	Feb 01, 2018	May 30, 2019		Simone Hanna	Aug 26, 2018	169	View
Lorem ipsum dolor sit	Lorem ipsum dolor sit amet, consectetur a	G	Jun 17, 2018	Jan 31, 2020	Simone Hanna	Simone Hanna	Jun 17, 2018	11	View
Lorem ipsum dolor sit	Lorem ipsum dolor sit amet, consectetur ad	G	Jul 01, 2018	Jan 31, 2020	Simone Hanna	Simone Hanna	Jul 06, 2018	21	View
Lorem ipsum dolor sit amet	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nu	G	Aug 06, 2018	Jan 31, 2020	Simone Hanna	Simone Hanna	Aug 06, 2018	32	View
Lorem ipsum dolor sit	Lorem ipsum dolor sit amet, consectetur ad	G	Aug 20, 2018	Jan 31, 2020	Simone Hanna	Simone Hanna	Aug 20, 2018	93	View
Lorem ipsum dolor sit amet, consec	Lorem ipsum dolor sit amet, consec	G	Oct 01, 2018	Jan 31, 2020		Simone Hanna	Oct 12, 2018	137	View
0% Financing - Backhoes & Excavators	0% Financing - Backhoes & Excavators	G	Feb 01, 2019	Jan 31, 2020	Gavin Perry	Gavin Perry	Dec 21, 2018	115	View

This page displays a detailed table of your current sales campaigns. Use the drop-down menu at the top left of the page to switch between History Campaigns, Current Campaigns, and Future Campaigns.

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

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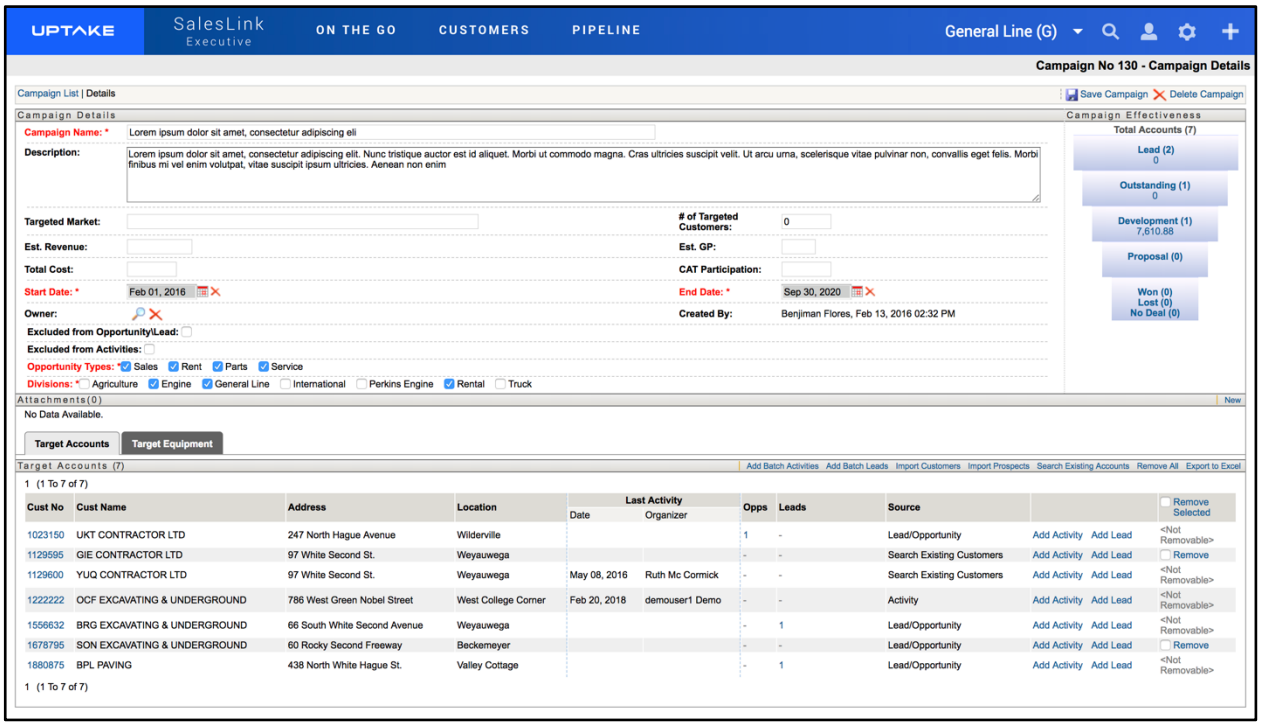
Campaign Details

Click the **[View]** button next to a campaign to view its Campaign Details page.



You can edit any of the fields in the Campaign Details section. Use the Campaign Effectiveness links to the right to update the status of any accounts associated with the campaign.

Click the **[New]** button to add an attachment to the campaign.

Use the buttons in the Target Accounts section to **Add Batch Activities, Add Batch Leads, Import Customers, Import Prospects, Search Existing Accounts, Remove All,** or **Export to Excel.**

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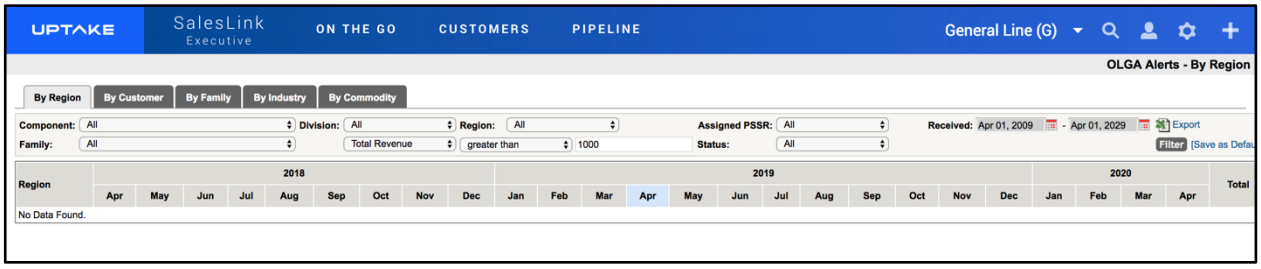
OLGA Alerts – By Region

Click the **OLGA Alerts – By Region** link under PIPELINE in the top navigation bar. The OLGA Alerts – By Region page displays.



This page displays a table of current, past, and future alerts that are automatically generated by OLGA, organized by Region. You can also use the tabs at the top of the page to organize the alerts by Customer, Family, Industry, or Commodity.

Click on an alert to view its details.

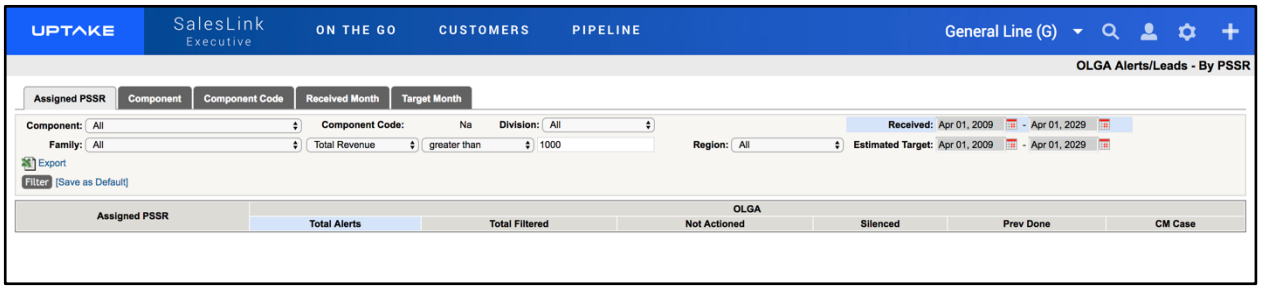
To filter the table:

1. Select the fields to filter by at the top of the page.
2. Select a date range for when the alert was received.
3. Click the **[Filter]** button.
4. Click the **[Save as Default]** button to save your filters as the default setting for the table.

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

OLGA Alerts/Leads – By Assigned PSSR

Click the **OLGA Alerts/Leads – By Assigned PSSR** link under PIPELINE in the top navigation bar. The OLGA Alerts/Leads – By PSSR page displays.



This page displays a detailed table of your current OLGA alerts and leads, organized by Assigned PSSR. You can also use the tabs at the top of the page to organize the alerts and leads by Component, Component Code, Received Month, and Target Month.

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Click on an alert or lead to view its details.

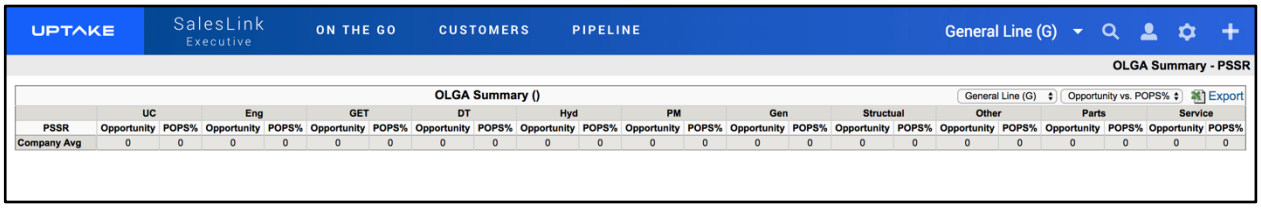
To filter the table:

1. Select the fields to filter by at the top of the page.
2. Select a date range for when the alert or lead was received.
3. Select a date range for the estimated target.
4. Click the **[Filter]** button.
5. Click the **[Save as Default]** button to save your filters as the default setting for the table.

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

OLGA Summary

Click the **OLGA Summary** link under PIPELINE in the top navigation bar. The OLGA Summary – PSSR page displays.



This page displays a detailed summary of your OLGA alerts, organized by PSSR and Company Average. Use the drop-down menus at the top of the page to filter the table. The table will automatically update as each filter is applied.

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

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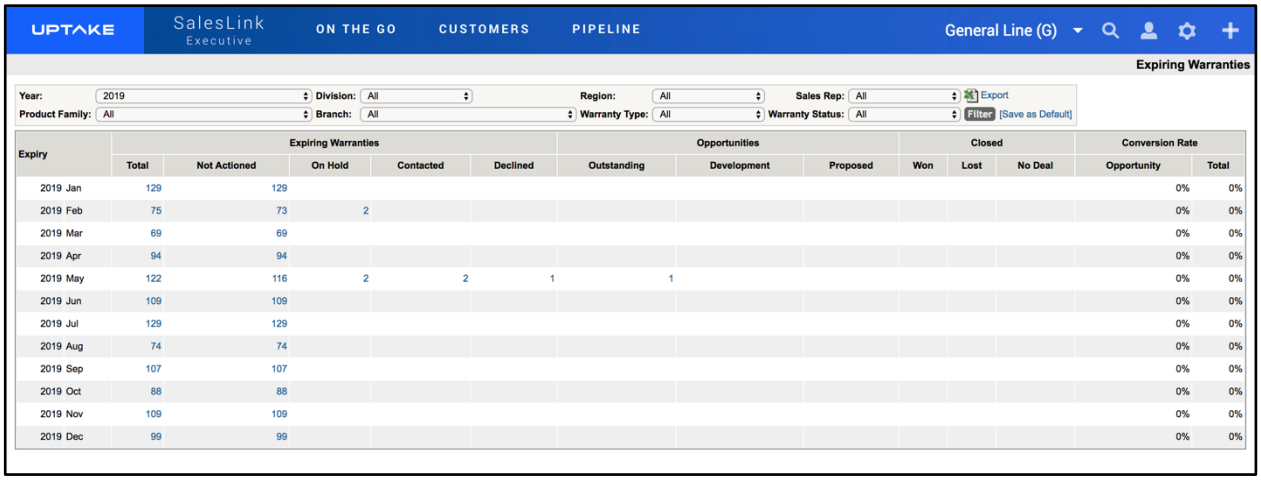
Expiring Warranties

Click the **Expiring Warranties** link under PIPELINE in the top navigation bar. The Expiring Warranties page displays.



Expiry	Expiring Warranties					Opportunities			Closed			Conversion Rate	
	Total	Not Actioned	On Hold	Contacted	Declined	Outstanding	Development	Proposed	Won	Lost	No Deal	Opportunity	Total
2019 Jan	129	129										0%	0%
2019 Feb	75	73	2									0%	0%
2019 Mar	69	69										0%	0%
2019 Apr	94	94										0%	0%
2019 May	122	116	2	2	1	1						0%	0%
2019 Jun	109	109										0%	0%
2019 Jul	129	129										0%	0%
2019 Aug	74	74										0%	0%
2019 Sep	107	107										0%	0%
2019 Oct	88	88										0%	0%
2019 Nov	109	109										0%	0%
2019 Dec	99	99										0%	0%

This page displays a detailed table of all expiring warranties in your accounts, organized by the month they're set to expire.

To filter the table:

1. Select the fields to filter by at the top of the page.
2. Click the **[Filter]** button.
3. Click the **[Set as Default]** button to set this filter configuration as the default whenever you visit this page.

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

Click on a number in the table to view details regarding those specific expiring warranties.

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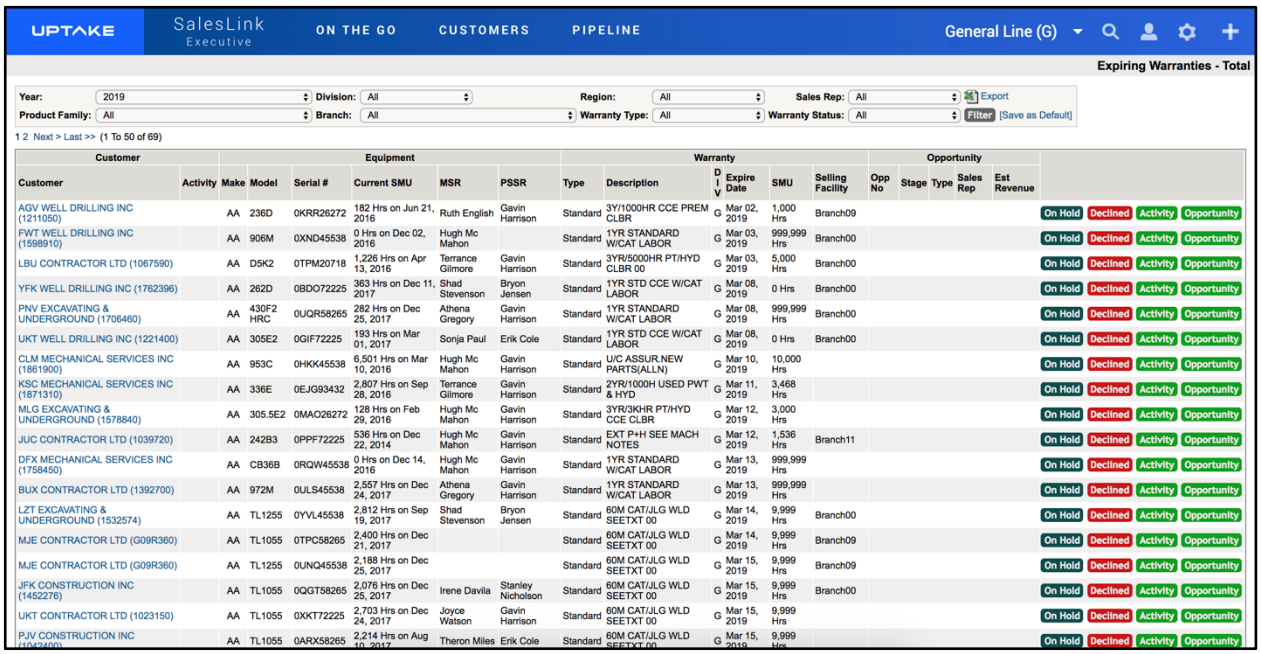

This page displays details regarding individual expiring warranties.

To filter the table:

1. Select the fields to filter by at the top of the page.
2. Click the **[Filter]** button.
3. Click the **[Set as Default]** button to set this filter configuration as the default whenever you visit this page.

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

To change the status of an individual warranty:

On Hold

1. Click the **[On Hold]** button.
2. Add any comments.
3. Click **[Save]**.

Declined

1. Click the **[Declined]** button.
2. Select a Reason from the drop-down menu.
3. Add any comments.
4. Click **[Save]**.

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Activity

1. Click the **[Activity]** button.
2. Enter all required information into the Add New Activity form.
3. Click **[Save Activity]**.

Opportunity

1. Click the **[Opportunity]** button.
2. Enter all required information into the Add New Opportunity form.
3. Click **[Save Opportunity]**.

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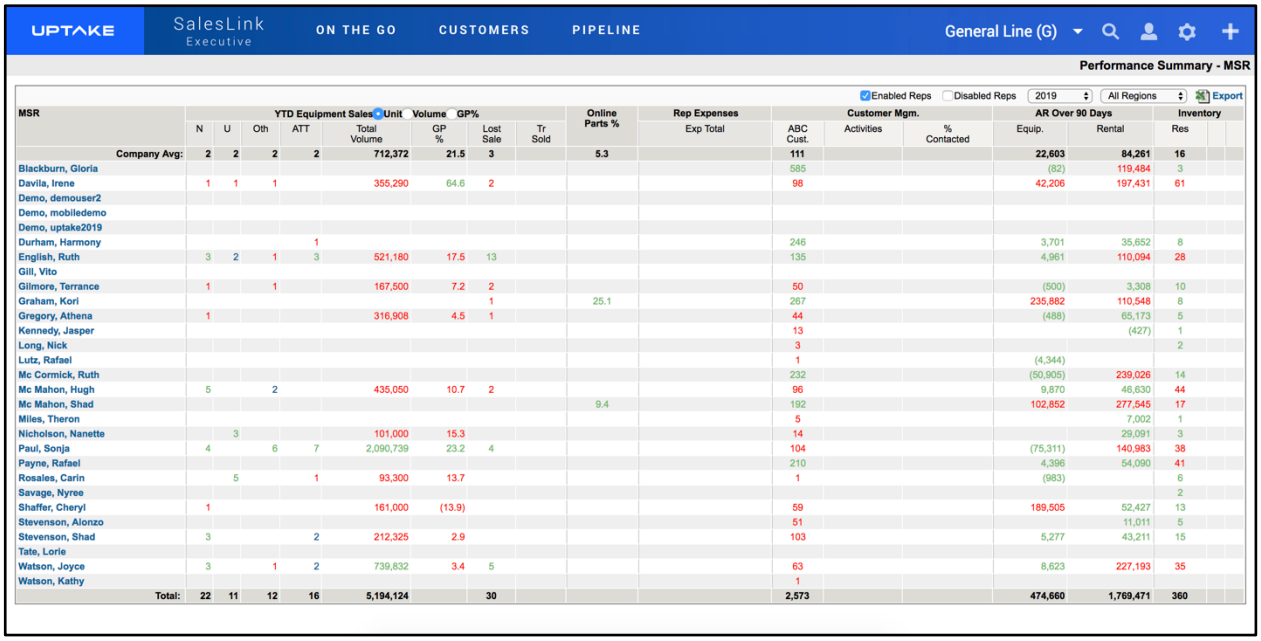
Sales

Sales Performance Summary

Click the **Sales Performance Summary** link under PIPELINE in the top navigation bar. The Performance Summary – MSR page displays.



MSR	YTD Equipment Sales (Unit / Volume / GP%)								Online Parts %	Rep Expenses	Customer Mgm.			AR Over 90 Days		Inventory
	N	U	Oth	ATT	Total Volume	GP %	Lost Sale	Tr Sold		Exp Total	ABC Cust.	Activities	% Contacted	Equip.	Rental	Res
Company Avg:	2	2	2	2	712,372	21.5	3		5.3		111			22,603	84,261	16
Blackburn, Gloria											585			(82)	119,484	3
Davila, Irene	1	1	1		355,290	64.6	2				98			42,206	197,431	61
Demo, demouser2																
Demo, mobiledemo																
Demo, uptake2019																
Durham, Harmony				1							246			3,701	35,652	8
English, Ruth	3	2	1	3	521,180	17.5	13				135			4,961	110,094	28
Gill, Vito																
Gilmore, Terrance	1		1		167,500	7.2	2				50			(500)	3,308	10
Graham, Kori							1		25.1		267			235,882	110,548	8
Gregory, Athena	1				316,908	4.5	1				44			(488)	65,173	5
Kennedy, Jasper											13				(427)	1
Long, Nick											3					2
Lutz, Rafael											1			(4,344)		
Mc Cormick, Ruth											232			(50,905)	239,026	14
Mc Mahon, Hugh	5		2		435,050	10.7	2				96			9,870	46,630	44
Mc Mahon, Shad									9.4		192			102,852	277,545	17
Miles, Theron											5				7,002	1
Nicholson, Nanette		3			101,000	15.3					14				29,091	3
Paul, Sonja	4		6	7	2,090,739	23.2	4				104			(75,311)	140,983	38
Payne, Rafael											210			4,396	54,090	41
Rosales, Carin		5		1	93,300	13.7					1			(983)		6
Savage, Nyree																2
Shaffer, Cheryl	1				161,000	(13.9)					59			189,505	52,427	13
Stevenson, Alonzo											51				11,011	5
Stevenson, Shad	3			2	212,325	2.9					103			5,277	43,211	15
Tate, Lorie																
Watson, Joyce	3		1	2	739,832	3.4	5				63			8,623	227,193	35
Watson, Kathy											1					
Total:	22	11	12	16	5,194,124		30				2,573			474,660	1,769,471	360

This page displays a detailed table of MSR sales information for all regions over the past year. The numbers appearing in green and red are being compared to the company average. Green represents above-average performance, red represents under-average performance. A number in black represents the company average.

Use the filters at the top of the page to view Enabled and Disabled reps, or change the Year and Division displayed in the table.

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

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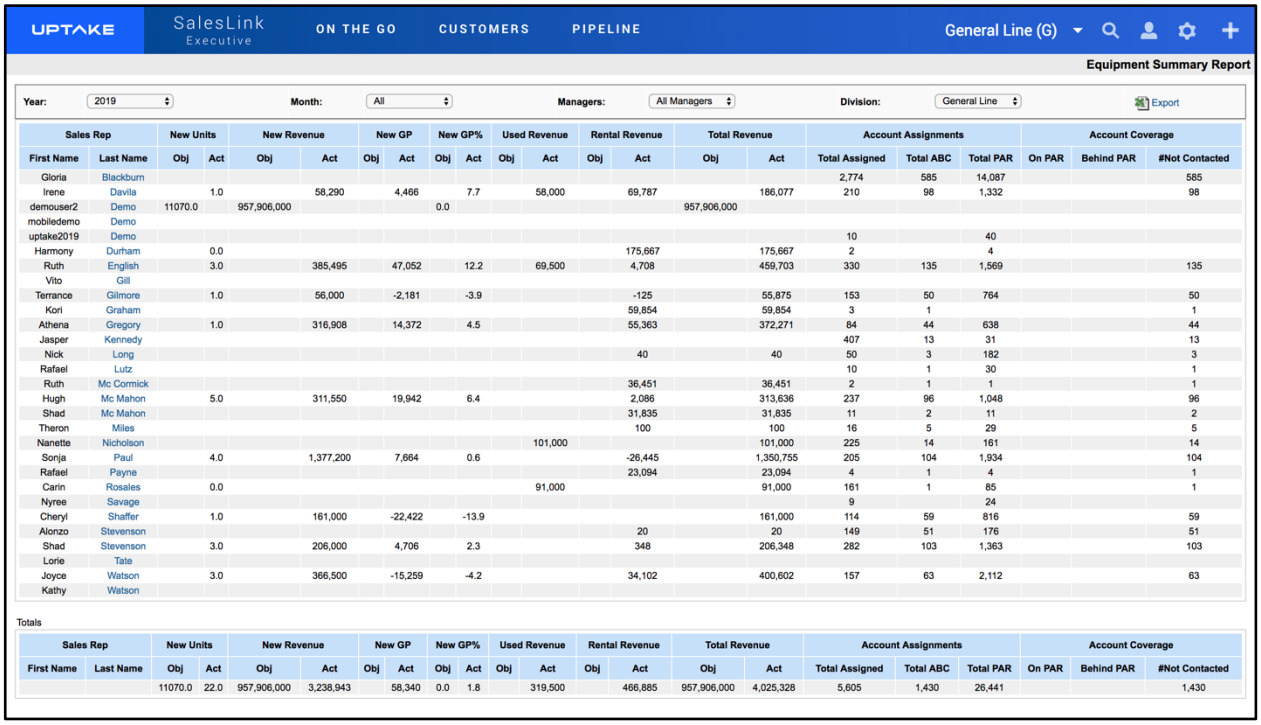
Equipment Sales Budget

Click the **Equipment Sales Budget** link under PIPELINE in the top navigation bar. The Equipment Summary Report page displays.



Sales Rep		New Units		New Revenue		New GP		New GP%		Used Revenue		Rental Revenue		Total Revenue		Account Assignments			Account Coverage		
First Name	Last Name	Obj	Act	Obj	Act	Obj	Act	Obj	Act	Obj	Act	Obj	Act	Obj	Act	Total Assigned	Total ABC	Total PAR	On PAR	Behind PAR	#Not Contacted
Gloria	Blackburn															2,774	585	14,087			585
Irene	Davila		1.0		58,290		4,466		7.7		58,000		69,787		186,077	210	98	1,332			98
demouser2	Demo	11070.0		957,906,000				0.0						957,906,000							
mobiledemo	Demo																				
uptake2019	Demo															10		40			
Harmony	Durham		0.0										175,667		175,667	2		4			
Ruth	English		3.0		385,495		47,052		12.2		69,500		4,708		459,703	330	135	1,569			135
Vito	Gill																				
Terrance	Gilmore		1.0		56,000		-2,181		-3.9				-125		55,875	153	50	764			50
Kori	Graham												59,854		59,854	3	1				1
Athena	Gregory		1.0		316,908		14,372		4.5				55,363		372,271	84	44	638			44
Jasper	Kennedy															407	13	31			13
Nick	Long												40		40	50	3	182			3
Rafael	Lutz															10	1	30			1
Ruth	Mc Cormick												36,451		36,451	2	1	1			1
Hugh	Mc Mahon		5.0		311,550		19,942		6.4				2,086		313,636	237	96	1,048			96
Shad	Mc Mahon												31,835		31,835	11	2	11			2
Theron	Miles												100		100	16	5	29			5
Nanette	Nicholson										101,000				101,000	225	14	161			14
Sonja	Paul		4.0		1,377,200		7,664		0.6				-26,445		1,350,755	205	104	1,934			104
Rafael	Payne												23,094		23,094	4	1	4			1
Carin	Rosales		0.0								91,000				91,000	161	1	85			1
Nyree	Savage															9		24			
Cheryl	Shaffer		1.0		161,000		-22,422		-13.9						161,000	114	59	816			59
Alonzo	Stevenson												20		20	149	51	176			51
Shad	Stevenson		3.0		206,000		4,706		2.3				348		206,348	282	103	1,363			103
Lorie	Tate																				
Joyce	Watson		3.0		366,500		-15,259		-4.2				34,102		400,602	157	63	2,112			63
Kathy	Watson																				

Totals

Sales Rep		New Units		New Revenue		New GP		New GP%		Used Revenue		Rental Revenue		Total Revenue		Account Assignments			Account Coverage		
First Name	Last Name	Obj	Act	Obj	Act	Obj	Act	Obj	Act	Obj	Act	Obj	Act	Obj	Act	Total Assigned	Total ABC	Total PAR	On PAR	Behind PAR	#Not Contacted
		11070.0	22.0	957,906,000	3,238,943		58,340	0.0	1.8		319,500		466,885	957,906,000	4,025,328	5,605	1,430	26,441			1,430

This page displays a detailed table of information regarding all revenue generated and accounts assigned across all regions. Use the drop-down menus at the top of the page to filter the table by Year, Month, Managers, or Division.

Click on a manager's name to view their region's budget details.

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

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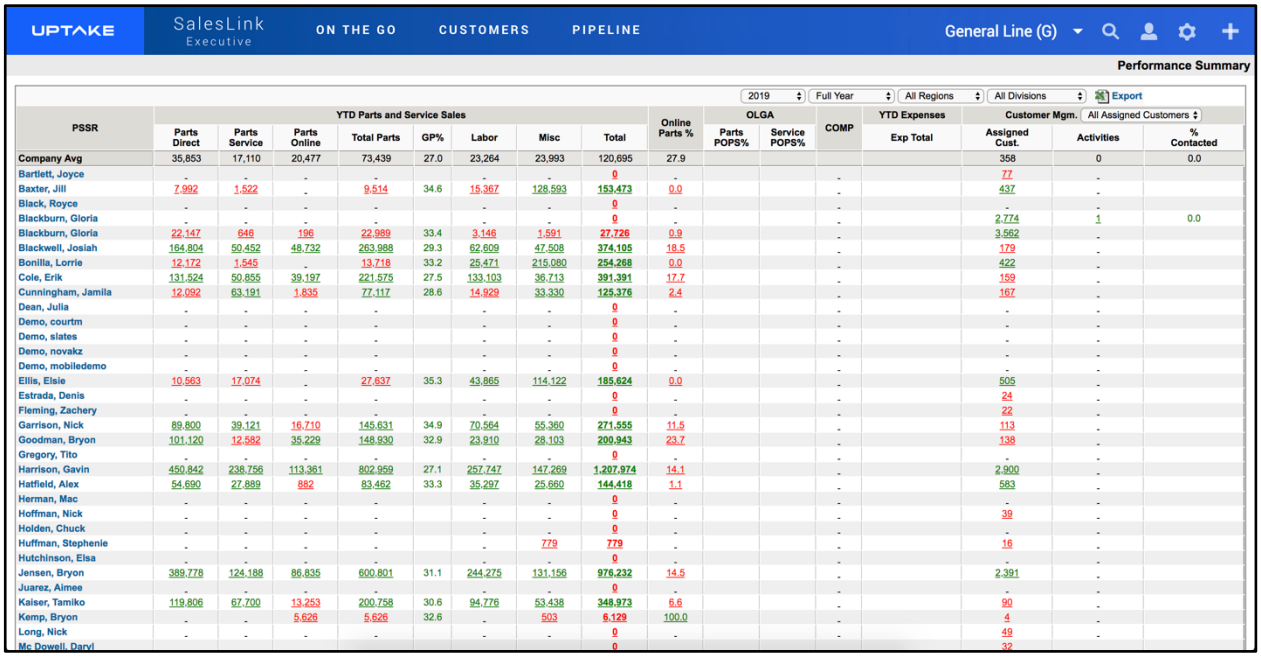
Parts and Service Performance Summary

Click the **Parts and Service Performance Summary** link under PIPELINE in the top navigation bar. The Performance Summary page displays.



PSSR	YTD Parts and Service Sales								Online Parts %	OLGA		COMP	YTD Expenses	Customer Mgm.		
	Parts Direct	Parts Service	Parts Online	Total Parts	GP%	Labor	Misc	Total		Parts POPS%	Service POPS%		Exp Total	Assigned Cust.	Activities	% Contacted
Company Avg	35,853	17,110	20,477	73,439	27.0	23,264	23,993	120,695	27.9					358	0	0.0
Bartlett, Joyce	-	-	-	-		-	-	0	-			-		77	-	
Baxter, Jill	7,992	1,522	-	9,514	34.6	15,367	128,593	153,473	0.0			-		437	-	
Black, Royce	-	-	-	-		-	-	0	-			-		-	-	
Blackburn, Gloria	-	-	-	-		-	-	0	-			-		2,774	1	0.0
Blackburn, Gloria	22,147	646	196	22,989	33.4	3,146	1,591	27,726	0.9			-		3,562	-	
Blackwell, Josiah	164,804	50,452	48,732	263,988	29.3	62,609	47,508	374,105	18.5			-		179	-	
Bonilla, Lorrie	12,172	1,545	-	13,718	33.2	25,471	215,080	254,268	0.0			-		422	-	
Cole, Erik	131,524	50,855	39,197	221,575	27.5	133,103	36,713	391,391	17.7			-		159	-	
Cunningham, Jamila	12,092	63,191	1,835	77,117	28.6	14,929	33,330	125,376	2.4			-		167	-	
Dean, Julia	-	-	-	-		-	-	0	-			-		-	-	
Demo, courtm	-	-	-	-		-	-	0	-			-		-	-	
Demo, slates	-	-	-	-		-	-	0	-			-		-	-	
Demo, novakz	-	-	-	-		-	-	0	-			-		-	-	
Demo, mobiledemo	-	-	-	-		-	-	0	-			-		-	-	
Ellis, Elsie	10,563	17,074	-	27,637	35.3	43,865	114,122	185,624	0.0			-		505	-	
Estrada, Denis	-	-	-	-		-	-	0	-			-		24	-	
Fleming, Zachery	-	-	-	-		-	-	0	-			-		22	-	
Garrison, Nick	89,800	39,121	16,710	145,631	34.9	70,564	55,360	271,555	11.5			-		113	-	
Goodman, Bryon	101,120	12,582	35,229	148,930	32.9	23,910	28,103	200,943	23.7			-		138	-	
Gregory, Tito	-	-	-	-		-	-	0	-			-		-	-	
Harrison, Gavin	450,842	238,756	113,361	802,959	27.1	257,747	147,269	1,207,974	14.1			-		2,900	-	
Hatfield, Alex	54,690	27,889	882	83,462	33.3	35,297	25,660	144,418	1.1			-		583	-	
Herman, Mac	-	-	-	-		-	-	0	-			-		-	-	
Hoffman, Nick	-	-	-	-		-	-	0	-			-		39	-	
Holden, Chuck	-	-	-	-		-	-	0	-			-		-	-	
Huffman, Stephenie	-	-	-	-		-	779	779	-			-		16	-	
Hutchinson, Elsa	-	-	-	-		-	-	0	-			-		-	-	
Jensen, Bryon	389,778	124,188	86,835	600,801	31.1	244,275	131,156	976,232	14.5			-		2,391	-	
Juarez, Aimee	-	-	-	-		-	-	0	-			-		-	-	
Kaiser, Tamiko	119,806	67,700	13,253	200,758	30.6	94,776	53,438	348,973	6.6			-		90	-	
Kemp, Bryon	-	-	5,626	5,626	32.6	-	503	6,129	100.0			-		4	-	
Long, Nick	-	-	-	-		-	-	0	-			-		49	-	
Mc Dowell, Daryl								0						32		

This page displays a detailed table of PSSR sales information for all regions over the past year. Performance as compared to company average is indicated in green and red. Green represents above-average performance, red represents under-average performance. A number in black represents the company average.

Use the filters at the top of the page to view a different Year, Quarter, Month, Region, or Division.

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

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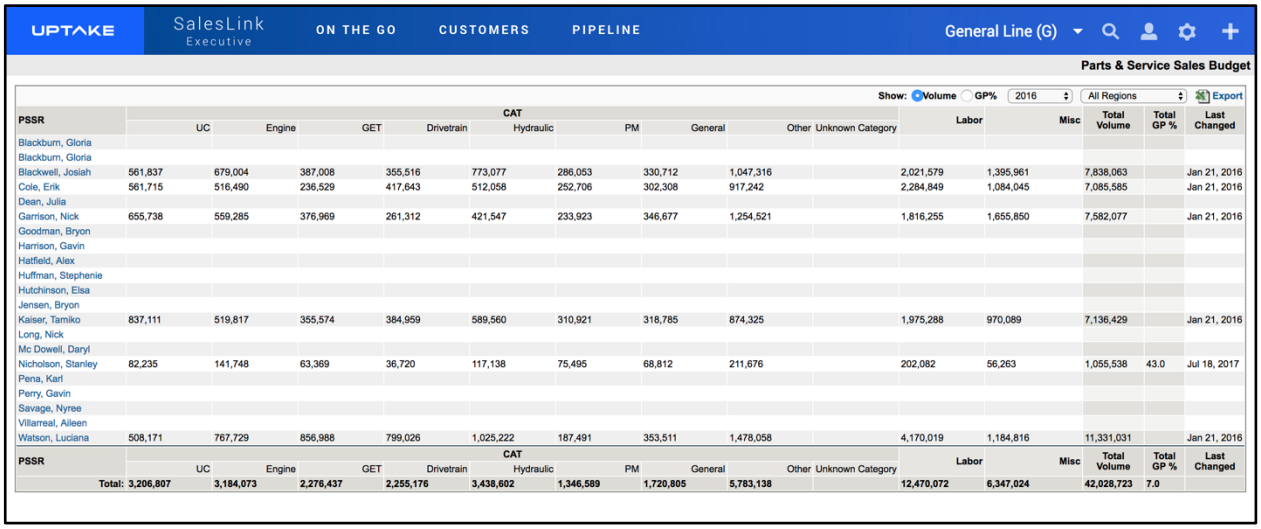
Parts & Service Sales Budget

Click the **Parts & Service Sales Budget** link under PIPELINE in the top navigation bar. The Parts & Service Sales Budget page displays.



PSSR	CAT UC	Engine	GET	Drivetrain	Hydraulic	PM	General	Other	Unknown Category	Labor	Misc	Total Volume	Total GP %	Last Changed
Blackburn, Gloria														
Blackburn, Gloria														
Blackwell, Josiah	561,837	679,004	387,008	355,516	773,077	286,053	330,712	1,047,316		2,021,579	1,395,961	7,838,063		Jan 21, 2016
Cole, Erik	561,715	516,490	236,529	417,643	512,058	252,706	302,308	917,242		2,284,849	1,084,045	7,085,585		Jan 21, 2016
Dean, Julia														
Garrison, Nick	655,738	559,285	376,969	261,312	421,547	233,923	346,677	1,254,521		1,816,255	1,655,850	7,582,077		Jan 21, 2016
Goodman, Bryon														
Harrison, Gavin														
Hatfield, Alex														
Huffman, Stephenie														
Hutchinson, Elsa														
Jensen, Bryon														
Kaiser, Tamiko	837,111	519,817	355,574	384,959	589,560	310,921	318,785	874,325		1,975,288	970,089	7,136,429		Jan 21, 2016
Long, Nick														
Mc Dowell, Daryl														
Nicholson, Stanley	82,235	141,748	63,369	36,720	117,138	75,495	68,812	211,676		202,082	56,263	1,055,538	43.0	Jul 18, 2017
Pena, Karl														
Perry, Gavin														
Savage, Nyree														
Villarreal, Aileen														
Watson, Luciana	508,171	767,729	856,988	799,026	1,025,222	187,491	353,511	1,478,058		4,170,019	1,184,816	11,331,031		Jan 21, 2016
PSSR	**CAT UC**	**Engine**	**GET**	**Drivetrain**	**Hydraulic**	**PM**	**General**	**Other**	**Unknown Category**	**Labor**	**Misc**	**Total Volume**	**Total GP %**	**Last Changed**
Total:	**3,206,807**	**3,184,073**	**2,276,437**	**2,255,176**	**3,438,602**	**1,346,589**	**1,720,805**	**5,783,138**		**12,470,072**	**6,347,024**	**42,028,723**	**7.0**	

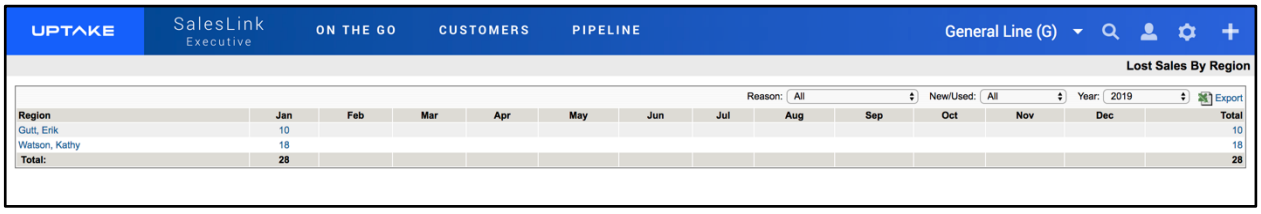
This page displays a detailed table of information regarding PSSR revenue generated across all regions. Use the filters at the top of page to display Volume, GP%, or a different Year or Region.

Click on a manager's name to view their region's PSSR budget.

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

Lost Sales by Region

Click the **Lost Sales by Region** link under PIPELINE in the top navigation bar. The Lost Sales by Region page displays.



Region	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Gutt, Erik	10												10
Watson, Kathy	18												18
Total:	**28**												**28**

This page displays a table of all lost sales over the current year, organized by region. Click on a number in the table to view/edit details of the lost sales for a specific region.

Use the drop-down menus at the top of the page to filter the table by Reason, New/Used, or Year.

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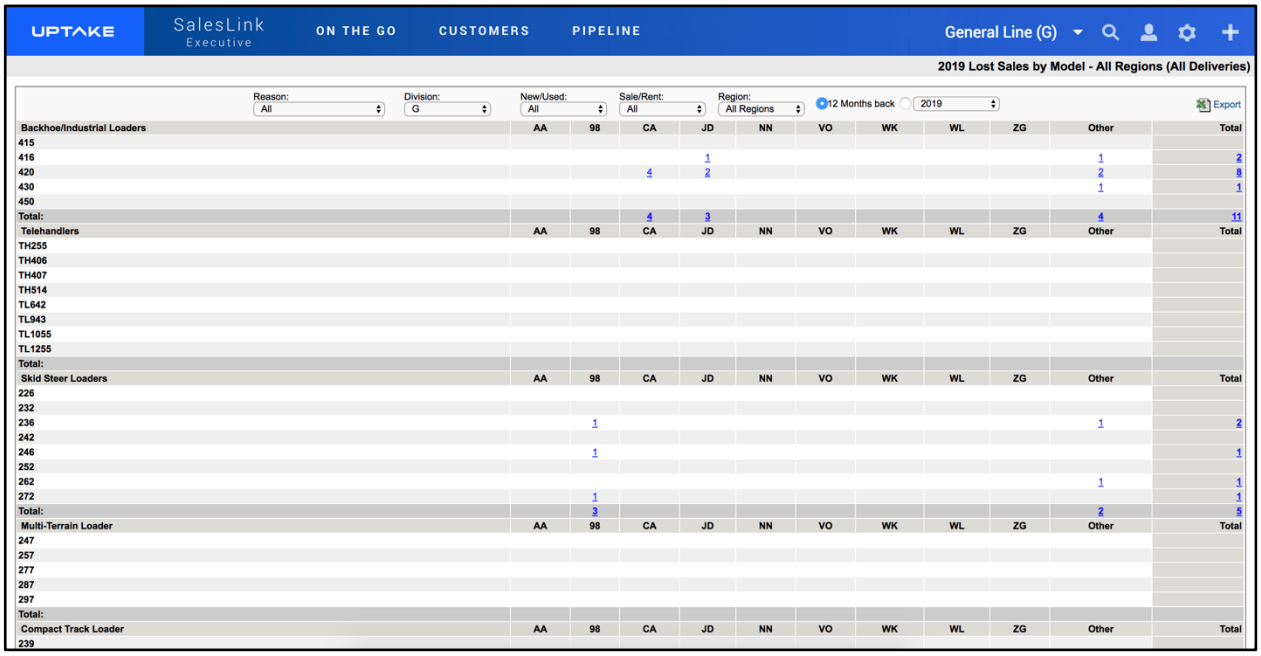
Export the table into an Excel spreadsheet by clicking the **[Export]** button at the top right of the page.

Lost Sales by Model (All)

Click the **Lost Sales by Model (All)** link under PIPELINE in the top navigation bar. The Lost Sales by Model – All Regions (All Deliveries) page displays.



This page displays a detailed table of all lost sales, organized by equipment model. Use the drop-down menus at the top of the page to filter the table. The table will automatically update as each filter selection is made.

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

Click on a number in the table to view details regarding the lost sale(s).

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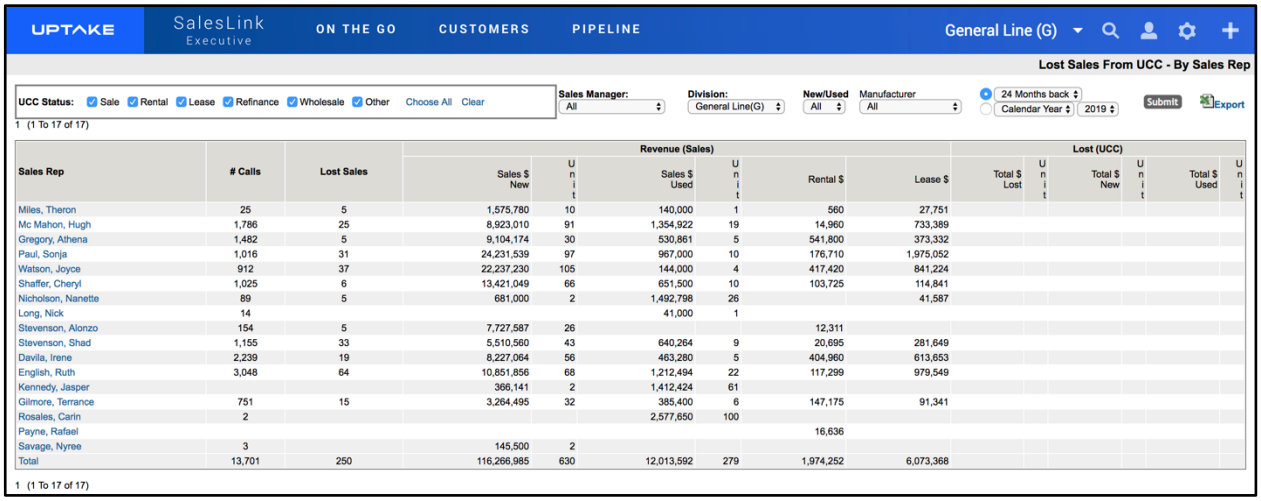
Lost Sales From UCC

Click the **Lost Sales From UCC** link under PIPELINE in the top navigation bar. The Lost Sales From UCC – By Sales Rep page displays.



This page displays a detailed table of information comparing each region's total Revenue to how much they Lost from UCC. Click on a manager's name to view only their specific region's information.

To filter the table:

1. Select the fields to filter by at the top of the page.
2. Click the **[Submit]** button.

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

Add Lost Sales

To add a lost sale:

1. Click the Plus icon at the far right of the top navigation bar.
2. Select **[Add Lost Sales]** from the drop-down menu.
3. Click the magnifying glass icon and search for a customer.
4. Select a division for the customer.
5. Enter all required information into the Lost Sales form.
6. Click the **[Save]** button to enter the lost sale.

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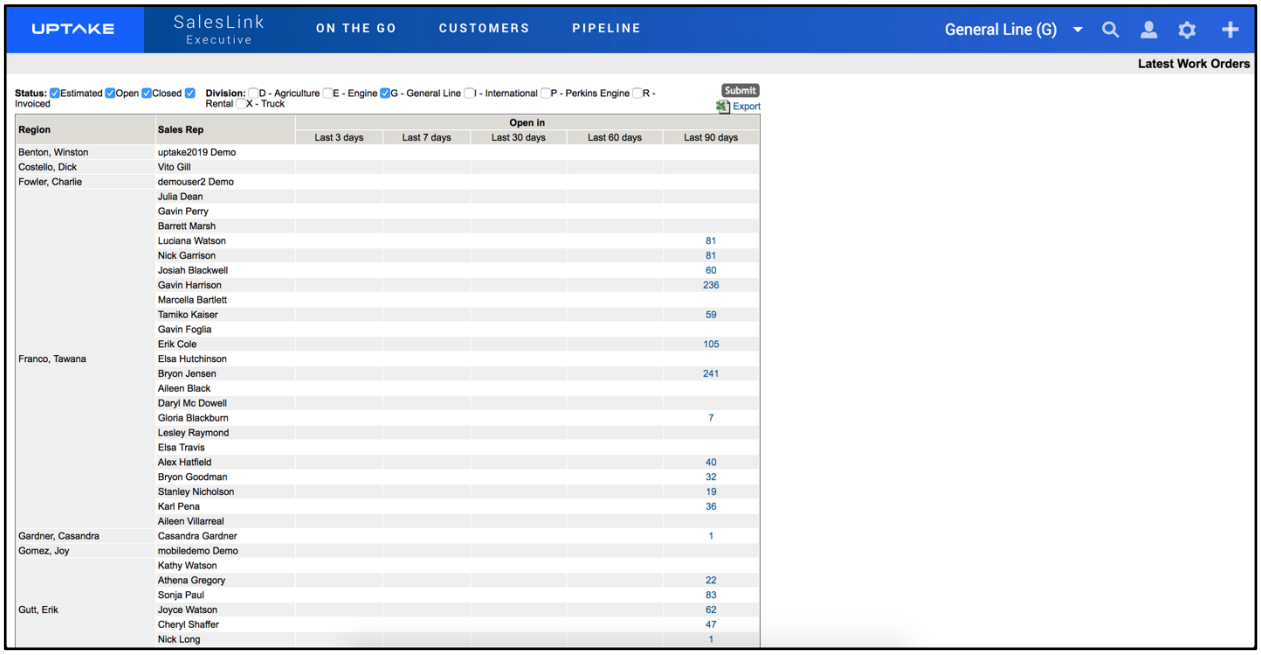
Latest Work Orders

Click the **Latest Work Orders** link under PIPELINE in the top navigation bar. The Latest Work Orders page displays.



This page displays a detailed table of all currently open work orders, organized by region.

To filter the table:

1. Select the fields to filter by at the top of the page.
2. Click the **[Submit]** button.

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

Click on a number in the table to view details regarding that sales rep's work orders.

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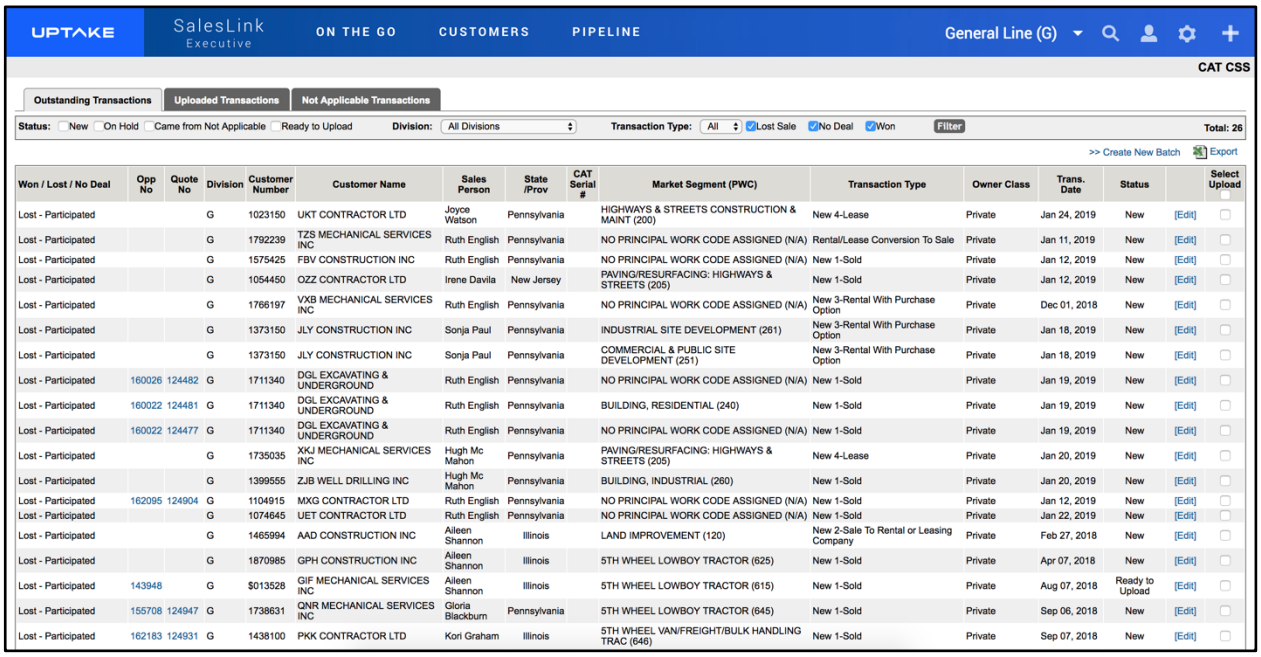
CAT CSS

Click the **CAT CSS** link under PIPELINE in the top navigation bar. The CAT CSS page displays.



Won / Lost / No Deal	Opp No	Quote No	Division	Customer Number	Customer Name	Sales Person	State /Prov	CAT Serial #	Market Segment (PWC)	Transaction Type	Owner Class	Trans. Date	Status		Select Upload
Lost - Participated			G	1023150	UKT CONTRACTOR LTD	Joyce Watson	Pennsylvania		HIGHWAYS & STREETS CONSTRUCTION & MAINT (200)	New 4-Lease	Private	Jan 24, 2019	New	[Edit]	
Lost - Participated			G	1792239	TZS MECHANICAL SERVICES INC	Ruth English	Pennsylvania		NO PRINCIPAL WORK CODE ASSIGNED (N/A)	Rental/Lease Conversion To Sale	Private	Jan 11, 2019	New	[Edit]	
Lost - Participated			G	1575425	FBV CONSTRUCTION INC	Ruth English	Pennsylvania		NO PRINCIPAL WORK CODE ASSIGNED (N/A)	New 1-Sold	Private	Jan 12, 2019	New	[Edit]	
Lost - Participated			G	1054450	OZZ CONTRACTOR LTD	Irene Davila	New Jersey		PAVING/RESURFACING: HIGHWAYS & STREETS (205)	New 1-Sold	Private	Jan 12, 2019	New	[Edit]	
Lost - Participated			G	1766197	VXB MECHANICAL SERVICES INC	Ruth English	Pennsylvania		NO PRINCIPAL WORK CODE ASSIGNED (N/A)	New 3-Rental With Purchase Option	Private	Dec 01, 2018	New	[Edit]	
Lost - Participated			G	1373150	JLY CONSTRUCTION INC	Sonja Paul	Pennsylvania		INDUSTRIAL SITE DEVELOPMENT (261)	New 3-Rental With Purchase Option	Private	Jan 18, 2019	New	[Edit]	
Lost - Participated			G	1373150	JLY CONSTRUCTION INC	Sonja Paul	Pennsylvania		COMMERCIAL & PUBLIC SITE DEVELOPMENT (251)	New 3-Rental With Purchase Option	Private	Jan 18, 2019	New	[Edit]	
Lost - Participated	160026	124482	G	1711340	DGL EXCAVATING & UNDERGROUND	Ruth English	Pennsylvania		NO PRINCIPAL WORK CODE ASSIGNED (N/A)	New 1-Sold	Private	Jan 19, 2019	New	[Edit]	
Lost - Participated	160022	124481	G	1711340	DGL EXCAVATING & UNDERGROUND	Ruth English	Pennsylvania		BUILDING, RESIDENTIAL (240)	New 1-Sold	Private	Jan 19, 2019	New	[Edit]	
Lost - Participated	160022	124477	G	1711340	DGL EXCAVATING & UNDERGROUND	Ruth English	Pennsylvania		NO PRINCIPAL WORK CODE ASSIGNED (N/A)	New 1-Sold	Private	Jan 19, 2019	New	[Edit]	
Lost - Participated			G	1735035	XKJ MECHANICAL SERVICES INC	Hugh Mc Mahon	Pennsylvania		PAVING/RESURFACING: HIGHWAYS & STREETS (205)	New 4-Lease	Private	Jan 20, 2019	New	[Edit]	
Lost - Participated			G	1399555	ZJB WELL DRILLING INC	Hugh Mc Mahon	Pennsylvania		BUILDING, INDUSTRIAL (260)	New 1-Sold	Private	Jan 20, 2019	New	[Edit]	
Lost - Participated	162095	124904	G	1104915	MXG CONTRACTOR LTD	Ruth English	Pennsylvania		NO PRINCIPAL WORK CODE ASSIGNED (N/A)	New 1-Sold	Private	Jan 12, 2019	New	[Edit]	
Lost - Participated			G	1074645	UET CONTRACTOR LTD	Ruth English	Pennsylvania		NO PRINCIPAL WORK CODE ASSIGNED (N/A)	New 1-Sold	Private	Jan 22, 2019	New	[Edit]	
Lost - Participated			G	1465994	AAD CONSTRUCTION INC	Aileen Shannon	Illinois		LAND IMPROVEMENT (120)	New 2-Sale To Rental or Leasing Company	Private	Feb 27, 2018	New	[Edit]	
Lost - Participated			G	1870985	GPH CONSTRUCTION INC	Aileen Shannon	Illinois		5TH WHEEL LOWBOY TRACTOR (625)	New 1-Sold	Private	Apr 07, 2018	New	[Edit]	
Lost - Participated	143948		G	$013528	GIF MECHANICAL SERVICES INC	Aileen Shannon	Illinois		5TH WHEEL LOWBOY TRACTOR (615)	New 1-Sold	Private	Aug 07, 2018	Ready to Upload	[Edit]	
Lost - Participated	155708	124947	G	1738631	QNR MECHANICAL SERVICES INC	Gloria Blackburn	Pennsylvania		5TH WHEEL LOWBOY TRACTOR (645)	New 1-Sold	Private	Sep 06, 2018	New	[Edit]	
Lost - Participated	162183	124931	G	1438100	PKK CONTRACTOR LTD	Kori Graham	Illinois		5TH WHEEL VAN/FREIGHT/BULK HANDLING TRAC (646)	New 1-Sold	Private	Sep 07, 2018	New	[Edit]	

The table on this page displays your currently outstanding transactions. Click the **[Edit]** button to edit the details of a transaction.

To filter the table:

1. Select the fields to filter by at the top of the page.
2. Click the **[Filter]** button.

Once you've made all necessary edits and filtered out transactions you don't need, check the Select Upload box next to all transactions you want to send to CAT. Click the **[Create New Batch]** button to upload the transaction. Your batch will then appear in the Uploaded Transactions section. Any transactions that were designated as Not Applicable will appear in the Not Applicable Transactions sections.

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

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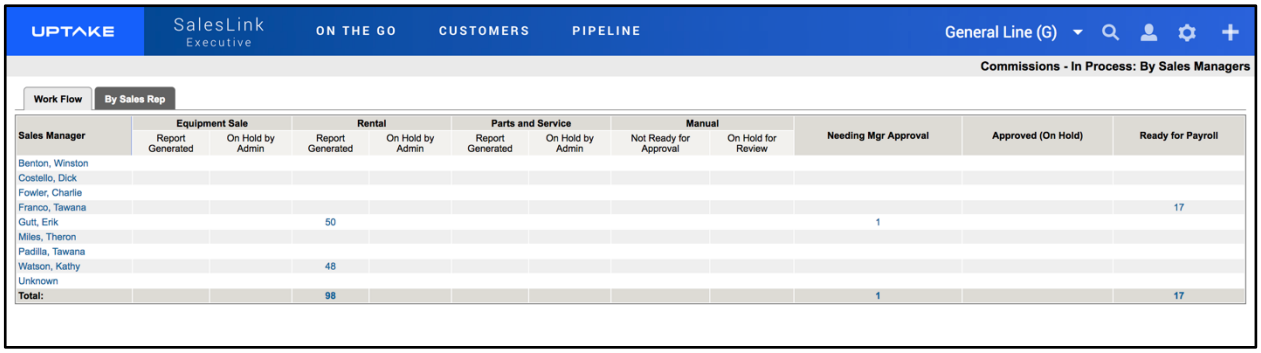
Commissions

Commissions – In Process

Click the **Commissions – In Process** link under PIPELINE in the top navigation bar. The Commissions – In Process: By Sales Managers page displays.



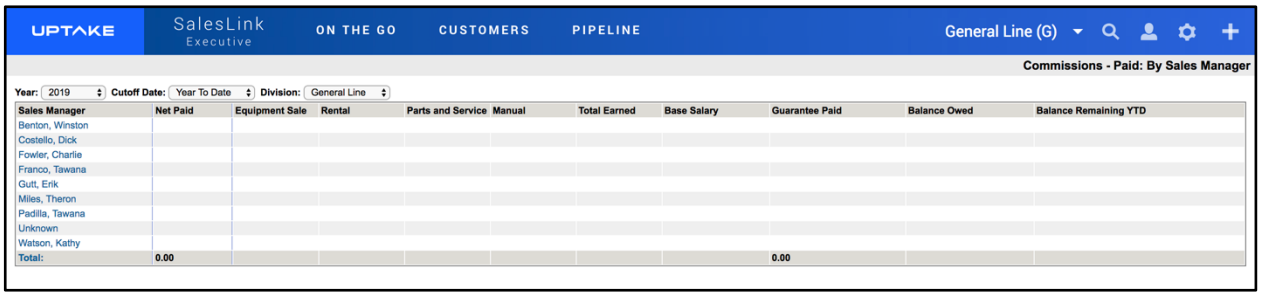
This page displays a table of all commissions that are currently in process, organized by region. Click on a number in the table to view details about the commissions. Approve commissions by checking the box next to a commission and then clicking the **[Approve]** button.

To submit commissions to payroll, click on a number in the Ready for Payroll section to display all approved commissions for a specific region. Then click the **[Submit to Payroll]** button to submit the commissions to payroll.

Click the By Sales Rep tab to view details regarding commissions earned in each region.

Commissions – Paid

Click the **Commissions – Paid** link under PIPELINE in the top navigation bar. The Commissions – Paid: By Sales Manager page displays.



The table on this page displays the amount of money paid to each region over the past year. Use the drop-down menus at the top of the page to filter the table by Year, Cutoff Date, and Division. Click on a manager's name to view the amount of money paid to each of their sales reps.

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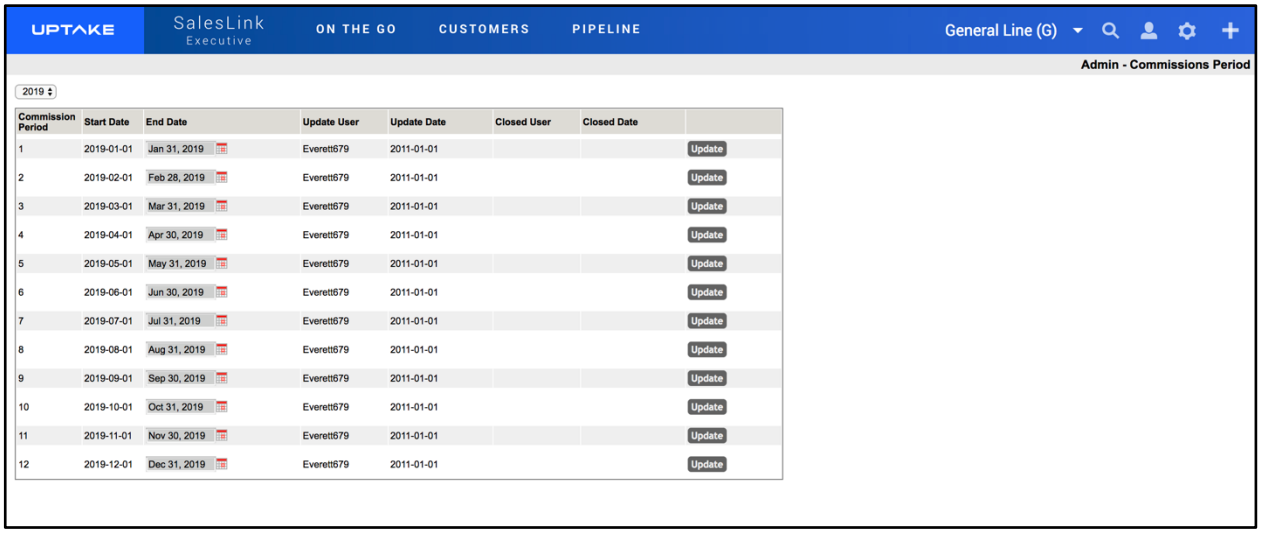
Admin – Commissions Period

Click the **Admin – Commissions Period** link under PIPELINE in the top navigation bar. The Admin – Commissions Period page displays.



This page displays each of your current commission periods. Use the drop-down menu at the top of the page to switch years.

To edit a commission period:

1. Click the calendar icon in the End Date column to change the end date of a commission period.
2. Click the **[Update]** button to update that commission period.

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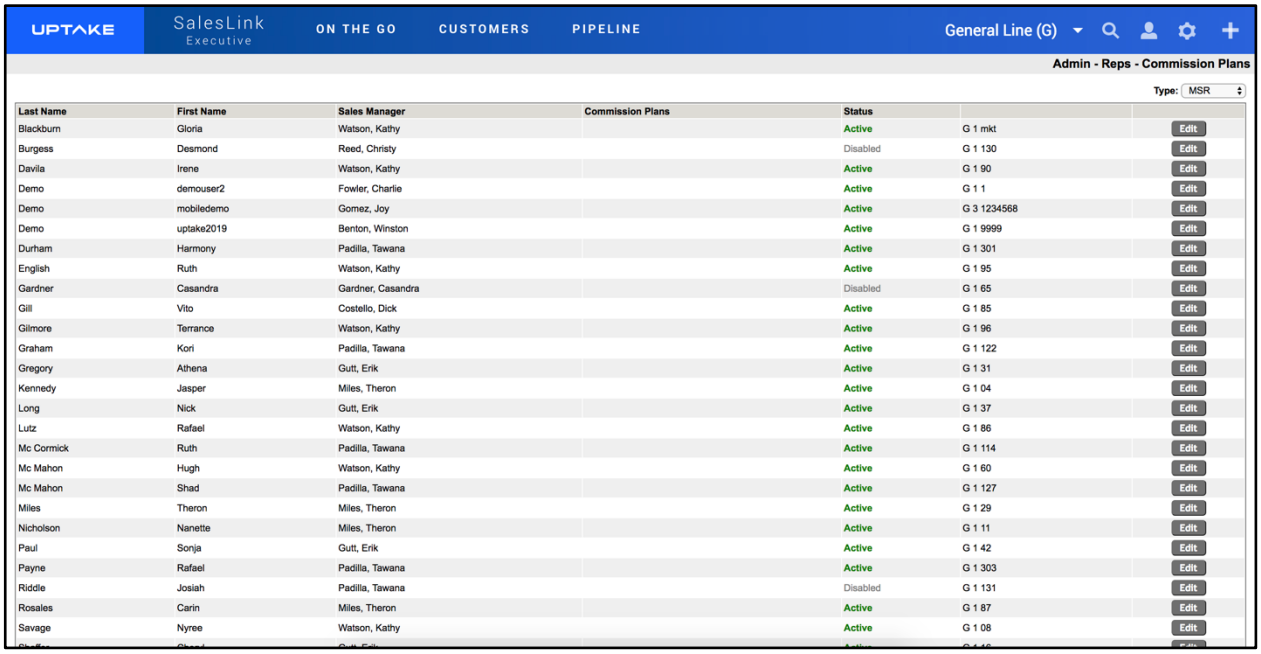
Admin – Reps – Commission Plans

Click the **Admin – Reps – Commission Plans** link under PIPELINE in the top navigation bar. The Admin – Reps – Commission Plans page displays.



Last Name	First Name	Sales Manager	Commission Plans	Status		
Blackburn	Gloria	Watson, Kathy		Active	G 1 mkt	Edit
Burgess	Desmond	Reed, Christy		Disabled	G 1 130	Edit
Davila	Irene	Watson, Kathy		Active	G 1 90	Edit
Demo	demouser2	Fowler, Charlie		Active	G 1 1	Edit
Demo	mobiledemo	Gomez, Joy		Active	G 3 1234568	Edit
Demo	uptake2019	Benton, Winston		Active	G 1 9999	Edit
Durham	Harmony	Padilla, Tawana		Active	G 1 301	Edit
English	Ruth	Watson, Kathy		Active	G 1 95	Edit
Gardner	Casandra	Gardner, Casandra		Disabled	G 1 65	Edit
Gill	Vito	Costello, Dick		Active	G 1 85	Edit
Gilmore	Terrance	Watson, Kathy		Active	G 1 96	Edit
Graham	Kori	Padilla, Tawana		Active	G 1 122	Edit
Gregory	Athena	Gutt, Erik		Active	G 1 31	Edit
Kennedy	Jasper	Miles, Theron		Active	G 1 04	Edit
Long	Nick	Gutt, Erik		Active	G 1 37	Edit
Lutz	Rafael	Watson, Kathy		Active	G 1 86	Edit
Mc Cormick	Ruth	Padilla, Tawana		Active	G 1 114	Edit
Mc Mahon	Hugh	Watson, Kathy		Active	G 1 60	Edit
Mc Mahon	Shad	Padilla, Tawana		Active	G 1 127	Edit
Miles	Theron	Miles, Theron		Active	G 1 29	Edit
Nicholson	Nanette	Miles, Theron		Active	G 1 11	Edit
Paul	Sonja	Gutt, Erik		Active	G 1 42	Edit
Payne	Rafael	Padilla, Tawana		Active	G 1 303	Edit
Riddle	Josiah	Padilla, Tawana		Disabled	G 1 131	Edit
Rosales	Carin	Miles, Theron		Active	G 1 87	Edit
Savage	Nyree	Watson, Kathy		Active	G 1 08	Edit

This page displays a detailed list of all sales reps and their individual commission plans. Use the Type drop-down menu to switch between MSR, PSSR, and RENTAL.

To edit a commission plan:

1. Click the **[Edit]** button next to a sales rep's commission plan.
2. Make any necessary changes in the SalesLink – Rep: Edit Rep form.
3. Click **[Update]**.

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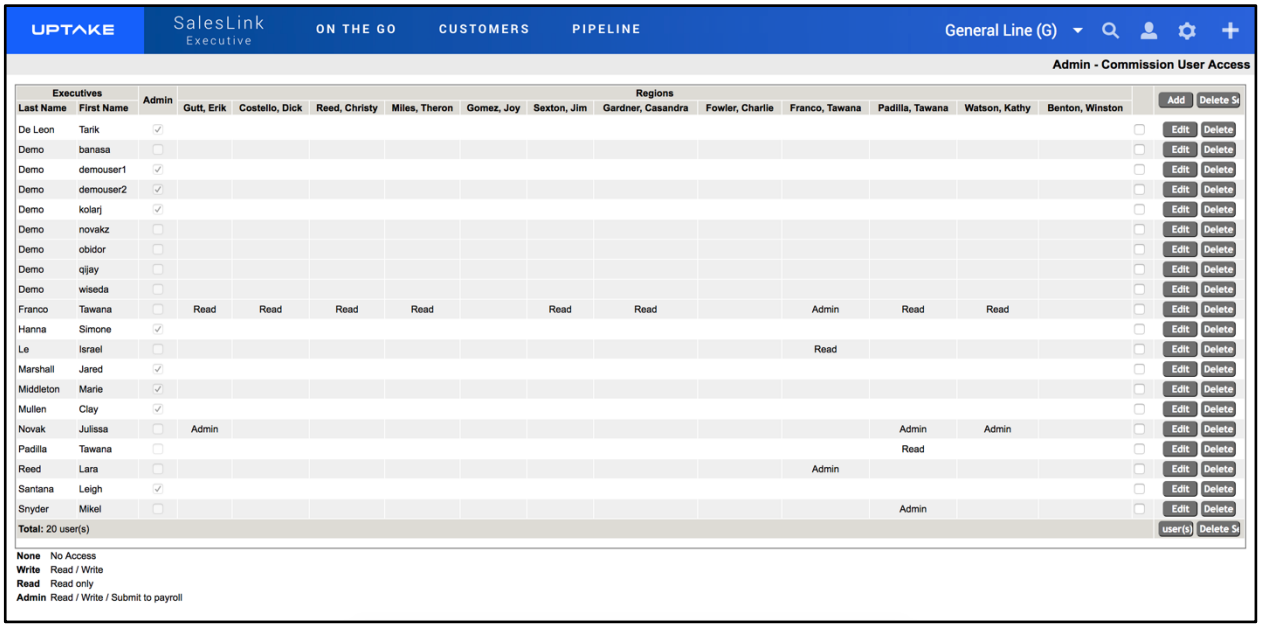
Admin – User Access

Click the **Admin – User Access** link under PIPELINE in the top navigation bar. The Admin – Commission User Access page displays.



This page displays details regarding executive and manager permissions in the Commissions area of SalesLink.

Permission Levels:

- None – No Access
- Write – Read / Write
- Read – Read Only
- Admin – Read / Write / Submit to Payroll

To edit permissions:

1. Click the **[Edit]** button.
2. Use the drop-down menus to change permission levels for users.
3. Click **[Save]**.

You can also remove users by clicking the **[Delete]** button.

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GATEKEEPER

Log in to CloudLink with your Username and Password, then click the **[ENTER]** button under **Gatekeeper**. You will be taken to the Gatekeeper Home page, which is the Latest New Requests page.

Navigation Bar

At the top of the screen is a navigation bar that can be accessed from anywhere in the application.

REQUESTS

Hover over the REQUESTS tab to access request pages To Do, History, and Admin.

SEARCH

Click on the Search icon and use the filters to find specific information within Gatekeeper.

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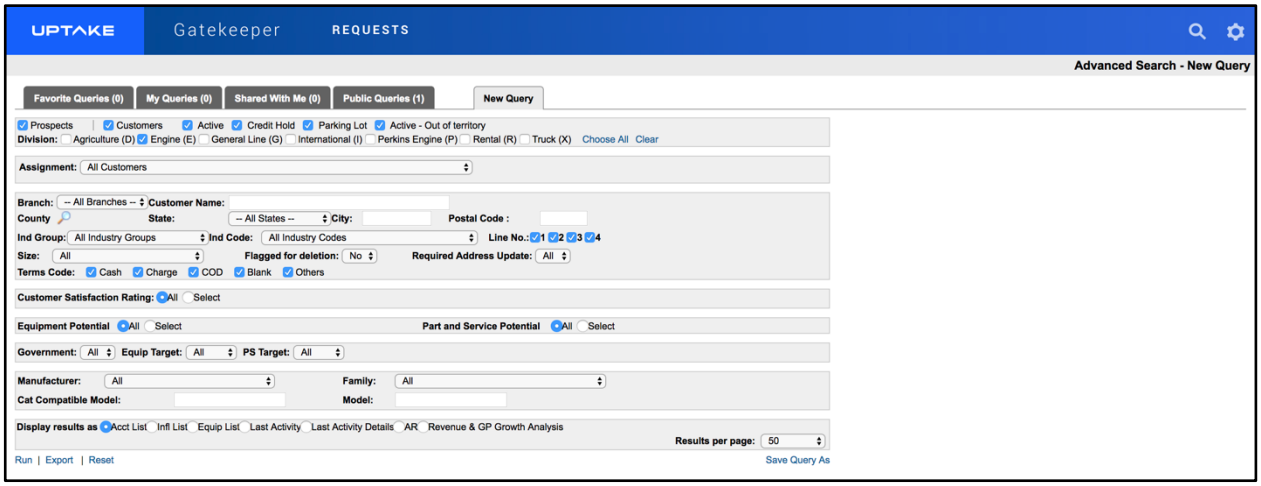
Advanced Search

Click the Search icon in the top navigation bar and then click **[Adv. Search]**. The Advanced Search – New Query page displays.



To run a new query:

1. Select all parameters you want to search by in the New Query form.
2. Select how you want to display your results.
3. Click the **[Run]** button at the bottom left of the page. Your results will display in the manner you selected.
4. Click the **[Reset]** button if you want to return all search parameters to their default settings.

Click the **[Export]** button to export your results into an Excel spreadsheet.

To save a query:

1. Click the **[Save Query As]** button at the bottom right of the page.
2. Enter a name for your query.
3. If you want to share your query, click the **[Change]** button and select users to share with from the list.
4. Click **[Save]**.

Click the tabs at the top of the page to view Favorite Queries, My Queries, Shared With Me, and Public Queries. Click the **[Run]** button to run one of these queries, or **[Export]** to export the results of a query to an Excel spreadsheet.

SETTINGS

Click on the Gear icon to view/edit your current Gatekeeper settings.

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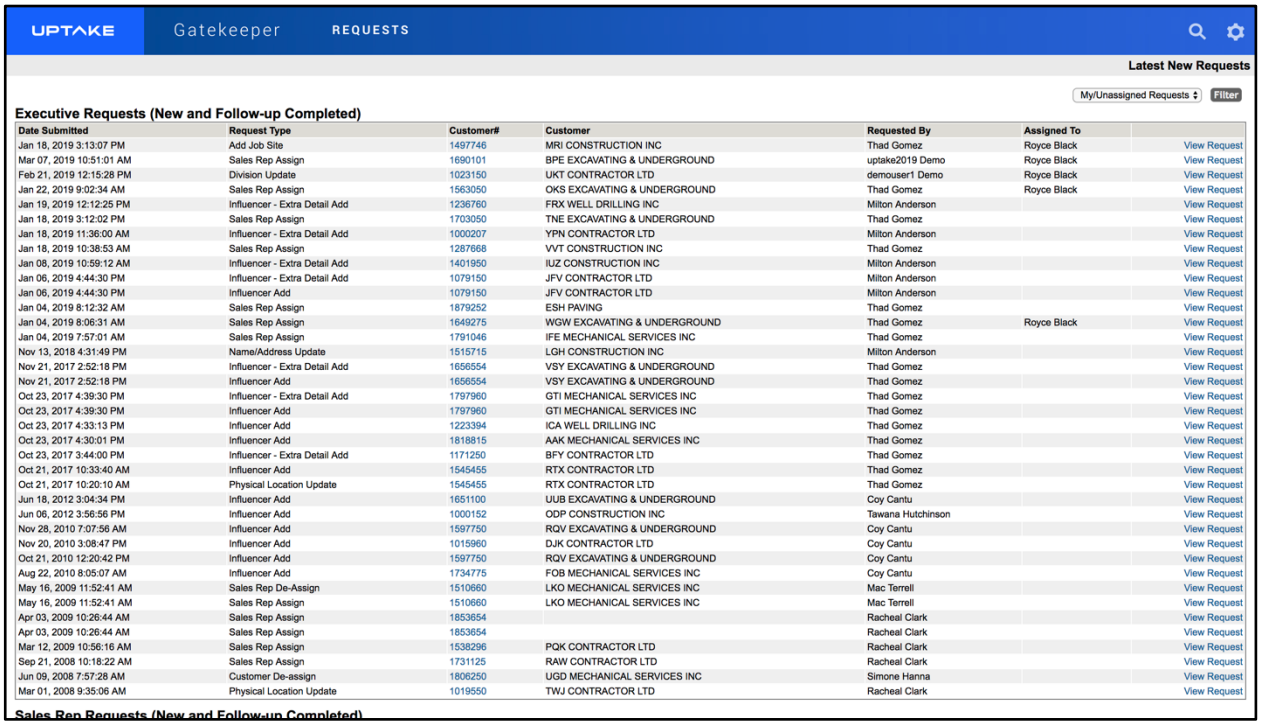
Home

The Home page for Gatekeeper is the Latest New Requests page. You can also access this page by clicking the **Home** link under REQUESTS in the top navigation bar.



This page displays an overview of all new Executive Requests, Sales Rep Requests, Customer Search Requests, iMacs Requests, Prospect – Flagged for Deletion, and Prospect – Flagged for Transfer.

To filter the table:

1. Use the drop-down menu at the top of the page to select My/Unassigned Requests, My Requests, Unassigned Requests, or Requests Assigned To.
2. Click the **[Filter]** button.

View Request:

1. Click the **[View Request]** button next to the request you want to view. A smaller window will pop up displaying the Request Details.
2. Make any changes necessary to the request.
3. Click **[Update]** to update the request.
4. You can also click the **[De-Assign]** button to remove yourself from assignment, or the **[Close]** button to close the request.

In the Prospect – Flagged for Deletion and Prospect – Flagged for Transfer sections you can take 3 actions:

- Click **[Delete Req]** to delete the request.

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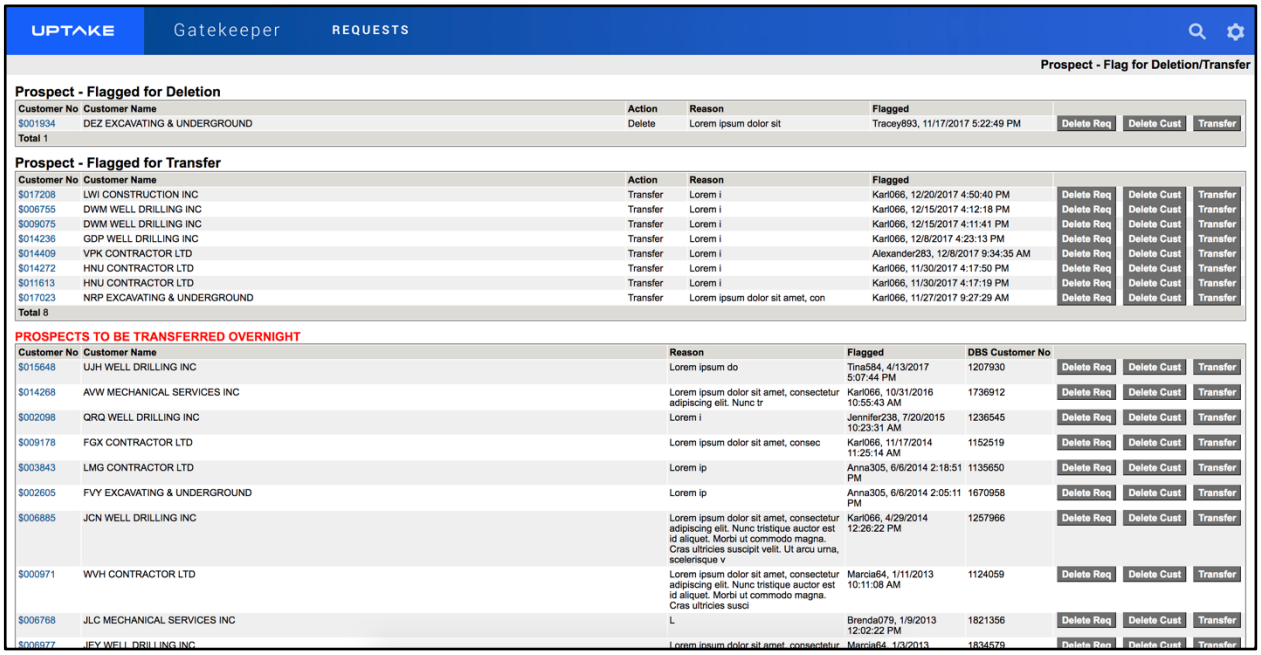
- Click **[Delete Cust]** to delete the customer.
- Click **[Transfer]** to transfer the prospect customer to a DBS customer.

Click on a Customer Number in the table to view details regarding that specific customer.

Admin

Prospect – Flag for Deletion / Transfer

Click the **Prospect – Flag for Deletion / Transfer** link under REQUESTS in the top navigation bar. The Prospect – Flag for Deletion / Transfer page displays.



The table on this page displays all prospects that have been flagged for deletion or transfer. In each section you can take 3 actions:

- Click **[Delete Req]** to delete the request.
- Click **[Delete Cust]** to delete the customer.
- Click **[Transfer]** to transfer the prospect customer to a DBS customer.

Click on a Customer Number in the table to view details regarding that specific customer.

NOTE: The Prospects to be Transferred Overnight section is a table of prospects that have been transferred to DBS customers, but are still waiting for the DBS night run to update.

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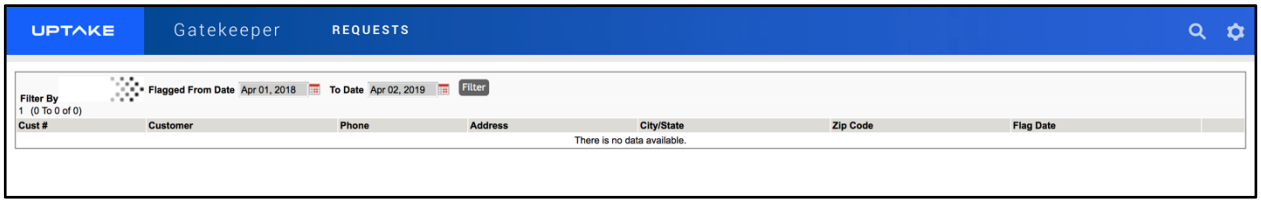
Customer – Flag for Deletion

Click the **Customer – Flag for Deletion** link under REQUESTS in the top navigation bar. The Customer – Flag for Deletion page displays.



The table on this page displays customers that have been flagged for deletion. Click on a Customer Number in the table to view details regarding that specific customer.

To filter the table:

1. Select a date range for when the customer was flagged using the calendar filters at the top of the page.
2. Click **[Filter]**.

View Request:

1. Click the **[View Request]** button next to the request you want to view. A smaller window will pop up displaying the Request Details.
2. Make any changes necessary to the request.
3. Click **[Update]** to update the request.
4. You can also click the **[De-Assign]** button to remove yourself from assignment, or the **[Close]** button to close the request.

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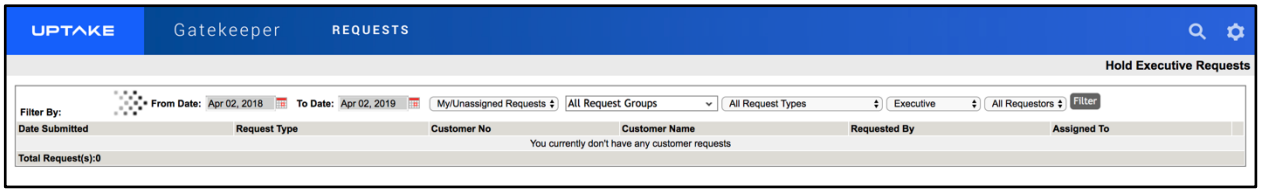
To Do

Hold

Click the **Hold** link under REQUESTS in the top navigation bar. The Hold Executive Requests page displays.



This page displays a detailed table of information regarding requests that have been put on hold by an administrator. Click on a Customer Number in the table to view details regarding that specific customer.

To filter the table:

1. Select a date range using the calendar filters at the top of the page.
2. Select fields to filter by using the drop-down menus at the top of the page.
3. Click **[Filter]**.

View Request:

1. Click the **[View Request]** button next to the request you want to view. A smaller window will pop up displaying the Request Details.
2. Make any changes necessary to the request.
3. Click **[Update]** to update the request.
4. You can also click the **[De-Assign]** button to remove yourself from assignment, or the **[Close]** button to close the request.

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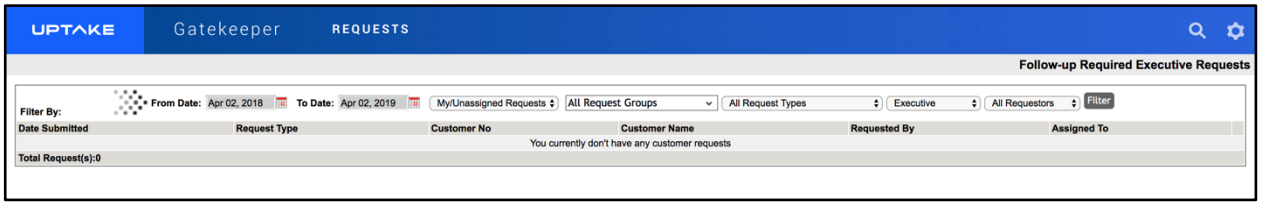
Follow-up Required

Click the **Follow-up Required** link under REQUESTS in the top navigation bar. The Follow-up Required Executive Requests page displays.



The table on this page displays requests that require more information or a follow-up. Click on a Customer Number in the table to view details regarding that specific customer.

To filter the table:

1. Select a date range using the calendar filters at the top of the page.
2. Select fields to filter by using the drop-down menus at the top of the page.
3. Click **[Filter]**.

View Request:

1. Click the **[View Request]** button next to the request you want to view. A smaller window will pop up displaying the Request Details.
2. Make any changes necessary to the request.
3. Click **[Update]** to update the request.
4. You can also click the **[De-Assign]** button to remove yourself from assignment, or the **[Close]** button to close the request.

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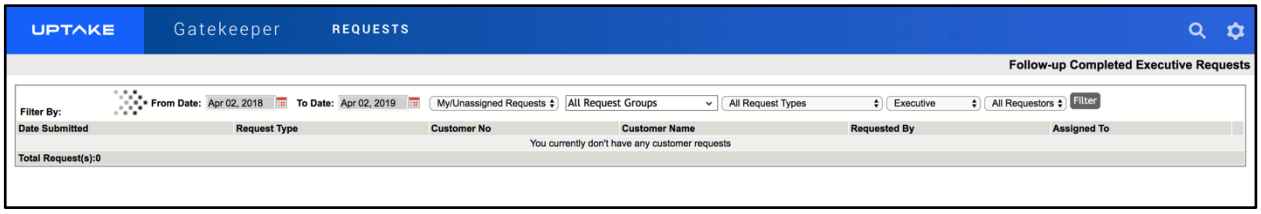
Follow-up Completed

Click the **Follow-up Completed** link under REQUESTS in the top navigation bar. The Follow-up Completed Executive Requests page displays.



The table on this page displays requests with completed follow-ups. Click on a Customer Number in the table to view details regarding that specific customer.

To filter the table:

1. Select a date range using the calendar filters at the top of the page.
2. Select fields to filter by using the drop-down menus at the top of the page.
3. Click **[Filter]**.

View Request:

1. Click the **[View Request]** button next to the request you want to view. A smaller window will pop up displaying the Request Details.
2. Make any changes necessary to the request.
3. Click **[Update]** to update the request.
4. You can also click the **[De-Assign]** button to remove yourself from assignment, or the **[Close]** button to close the request.

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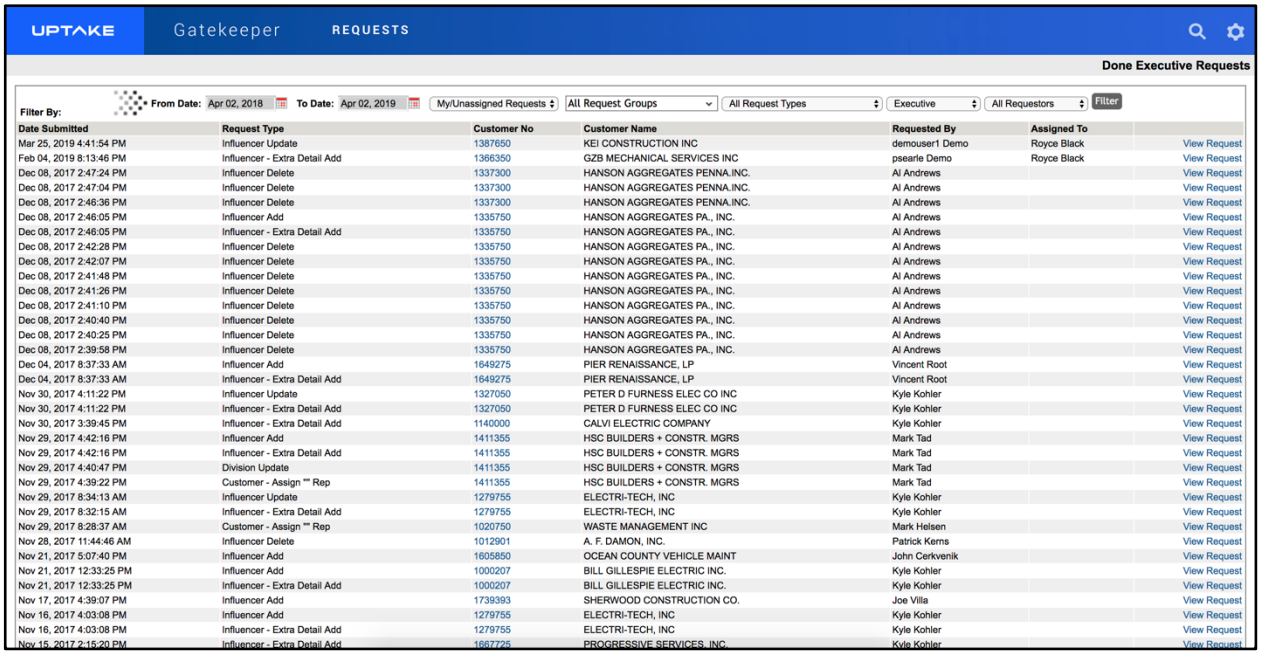
History

Done

Click the **Done** link under REQUESTS in the top navigation bar. The Done Executive Requests page displays.



The table on this page displays requests that have been processed and marked as complete. Click **[View Request]** to view a specific request's Request Details.

To filter the table:

1. Select a date range using the calendar filters at the top of the page.
2. Select fields to filter by using the drop-down menus at the top of the page.
3. Click **[Filter]**.

NOTE: Once a request has been marked complete, no further changes can be made to it.

Click on a Customer Number in the table to view details regarding that specific customer.

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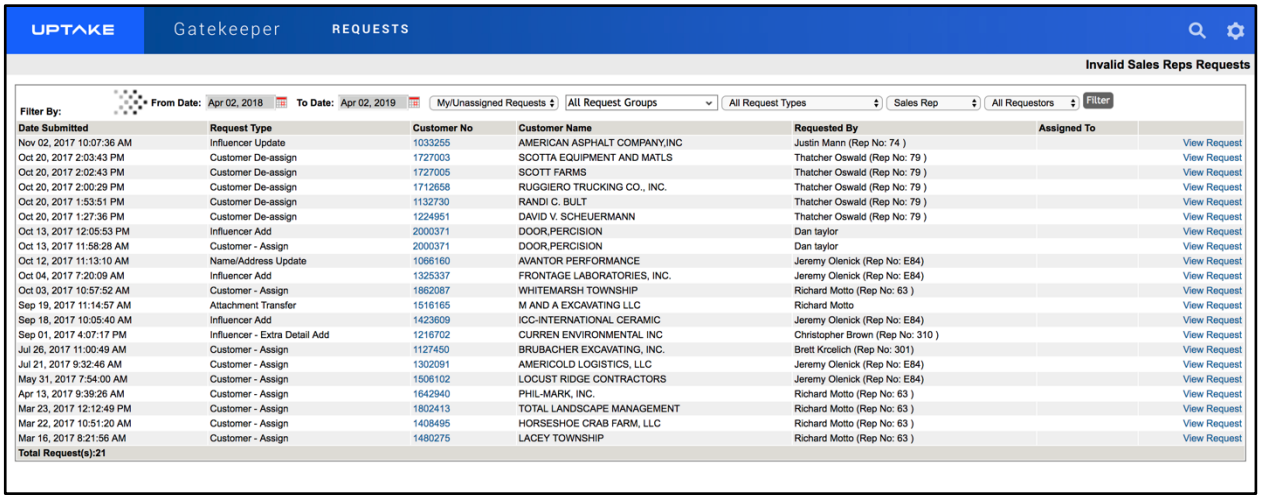
Invalid

Click the **Invalid** link under REQUESTS in the top navigation bar. The Invalid Sales Reps Requests page displays.



Date Submitted	Request Type	Customer No	Customer Name	Requested By	Assigned To	
Nov 02, 2017 10:07:36 AM	Influencer Update	1033255	AMERICAN ASPHALT COMPANY,INC	Justin Mann (Rep No: 74)		View Request
Oct 20, 2017 2:03:43 PM	Customer De-assign	1727003	SCOTTA EQUIPMENT AND MATLS	Thatcher Oswald (Rep No: 79)		View Request
Oct 20, 2017 2:02:43 PM	Customer De-assign	1727005	SCOTT FARMS	Thatcher Oswald (Rep No: 79)		View Request
Oct 20, 2017 2:00:29 PM	Customer De-assign	1712658	RUGGIERO TRUCKING CO., INC.	Thatcher Oswald (Rep No: 79)		View Request
Oct 20, 2017 1:53:51 PM	Customer De-assign	1132730	RANDI C. BULT	Thatcher Oswald (Rep No: 79)		View Request
Oct 20, 2017 1:27:36 PM	Customer De-assign	1224951	DAVID V. SCHEUERMANN	Thatcher Oswald (Rep No: 79)		View Request
Oct 13, 2017 12:05:53 PM	Influencer Add	2000371	DOOR,PERCISION	Dan taylor		View Request
Oct 13, 2017 11:58:28 AM	Customer - Assign	2000371	DOOR,PERCISION	Dan taylor		View Request
Oct 12, 2017 11:13:10 AM	Name/Address Update	1066160	AVANTOR PERFORMANCE	Jeremy Olenick (Rep No: E84)		View Request
Oct 04, 2017 7:20:09 AM	Influencer Add	1325337	FRONTAGE LABORATORIES, INC.	Jeremy Olenick (Rep No: E84)		View Request
Oct 03, 2017 10:57:52 AM	Customer - Assign	1862087	WHITEMARSH TOWNSHIP	Richard Motto (Rep No: 63)		View Request
Sep 19, 2017 11:14:57 AM	Attachment Transfer	1516165	M AND A EXCAVATING LLC	Richard Motto		View Request
Sep 18, 2017 10:05:40 AM	Influencer Add	1423609	ICC-INTERNATIONAL CERAMIC	Jeremy Olenick (Rep No: E84)		View Request
Sep 01, 2017 4:07:17 PM	Influencer - Extra Detail Add	1216702	CURREN ENVIRONMENTAL INC	Christopher Brown (Rep No: 310)		View Request
Jul 26, 2017 11:00:49 AM	Customer - Assign	1127450	BRUBACHER EXCAVATING, INC.	Brett Krcelich (Rep No: 301)		View Request
Jul 21, 2017 9:32:46 AM	Customer - Assign	1302091	AMERICOLD LOGISTICS, LLC	Jeremy Olenick (Rep No: E84)		View Request
May 31, 2017 7:54:00 AM	Customer - Assign	1506102	LOCUST RIDGE CONTRACTORS	Jeremy Olenick (Rep No: E84)		View Request
Apr 13, 2017 9:39:26 AM	Customer - Assign	1642940	PHIL-MARK, INC.	Richard Motto (Rep No: 63)		View Request
Mar 23, 2017 12:12:49 PM	Customer - Assign	1802413	TOTAL LANDSCAPE MANAGEMENT	Richard Motto (Rep No: 63)		View Request
Mar 22, 2017 10:51:20 AM	Customer - Assign	1408495	HORSESHOE CRAB FARM, LLC	Richard Motto (Rep No: 63)		View Request
Mar 16, 2017 8:21:56 AM	Customer - Assign	1480275	LACEY TOWNSHIP	Richard Motto (Rep No: 63)		View Request
Total Request(s):21						

The table on this page displays requests that have been marked invalid and will not be completed.

To filter the table:

1. Select a date range using the calendar filters at the top of the page.
2. Select fields to filter by using the drop-down menus at the top of the page.
3. Click **[Filter]**.

View Request:

5. Click the **[View Request]** button next to the request you want to view. A smaller window will pop up displaying the Request Details.
6. Make any changes necessary to the request.
7. Click **[Update]** to update the request.
8. You can also click the **[De-Assign]** button to remove yourself from assignment, or the **[Close]** button to close the request.

Click on a Customer Number in the table to view details regarding that specific customer.

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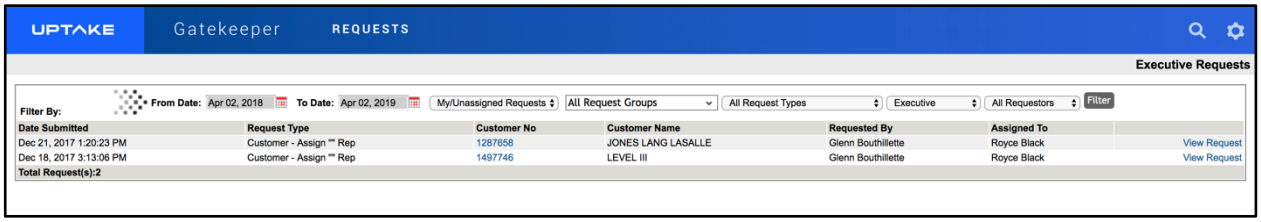
Done and Copy

Click the **Done and Copy** link under REQUESTS in the top navigation bar. The Executive Requests page displays.



This page displays a detailed table of information regarding requests that were marked as complete, but the customer information was copied into a new request. Click **[View Request]** to view a specific request's Request Details.

To filter the table:

1. Select a date range using the calendar filters at the top of the page.
2. Select fields to filter by using the drop-down menus at the top of the page.
3. Click **[Filter]**.

NOTE: Once a request has been marked complete, no further changes can be made to it.

Click on a Customer Number in the table to view details regarding that specific customer.

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