

A large, light blue geometric shape, resembling a stylized 'A' or a mountain peak, is positioned in the upper half of the page. It is composed of several triangular sections meeting at a central point.

Industrial CRM
SalesLink*

USER GUIDE
Updated June 12, 2019

UPTAKE

****includes Customer Issue Management and
Commission Framework***

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 This user guide will be updated on an ongoing basis and may have slightly outdated content due to the frequency of software updates.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

TRADEMARKS

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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.

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.

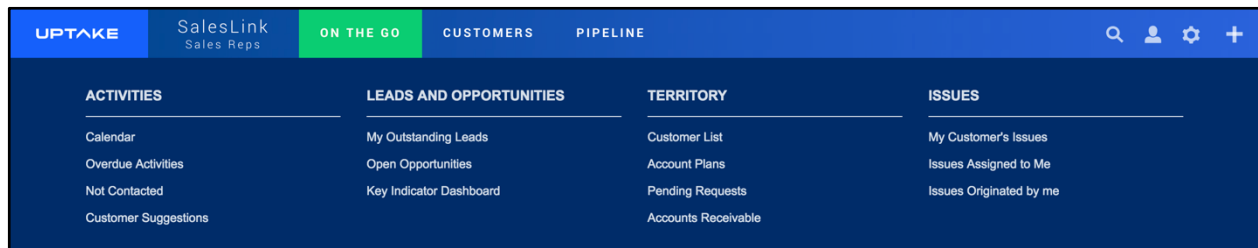
Below the small calendar are useful links related to your Activities, Customers, Leads and Opportunities, Customer Order to Invoice, Outstanding Issues, and OLGA Leads.

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

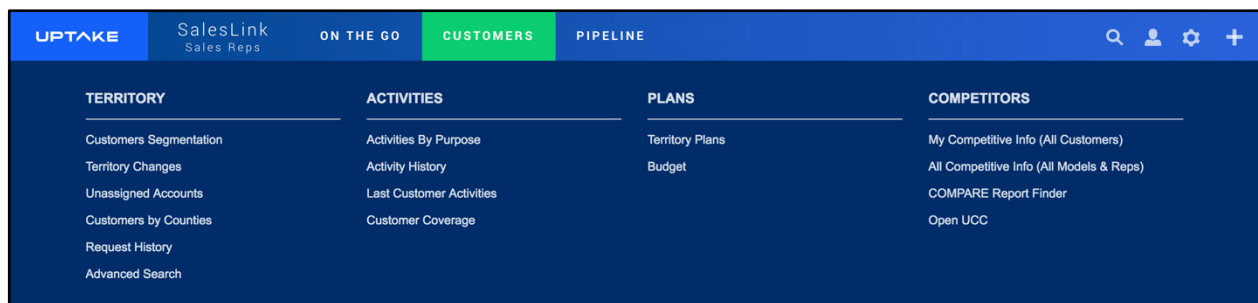
At the top of the screen is a navigation bar that can be accessed from anywhere in the application.

ON THE GO



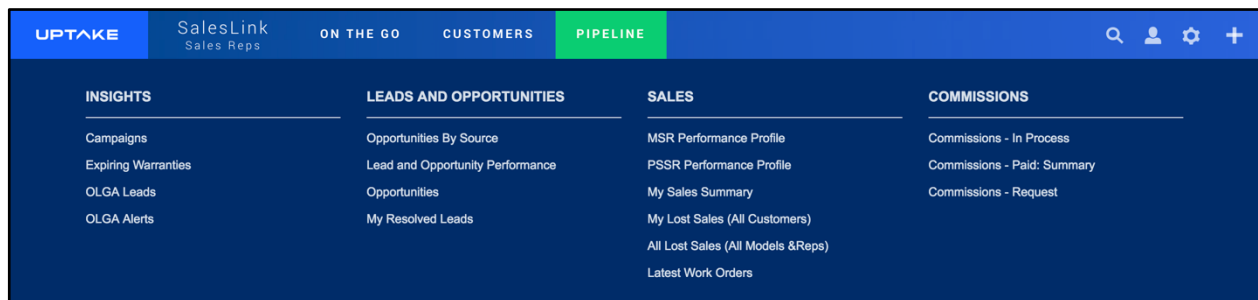
Hover over the ON THE GO tab to access pages related to your daily Activities, Leads and Opportunities, Territory, and Issues.

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.

SEARCH



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

PROFILE



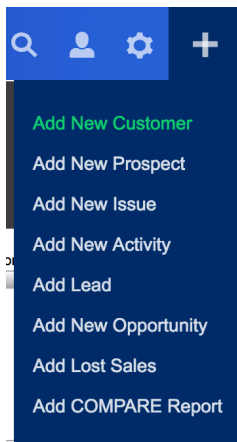
Click on the Profile icon to view/edit your current User Profile information.

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.

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.



The screenshot shows the 'Add New Activity' form in the SalesLink interface. The form is titled 'Add New Activity' and includes the following fields and sections:




- Customer:** Radio buttons for Existing, Temp Customer (not stored in account list), and Not Customer Related.
- Subject:** Text input field.
- Date/Time:** Date and time pickers, with a 'Show 15 min interval' checkbox.
- Type:** Dropdown menu with 'Telephone' selected.
- Main Purpose:** Text input field.
- Mileage:** Text input field.
- Important Notes or information:** Text area.
- Checklist:** Checklist area with a 'Delete' button.
- Follow up Activity:** Radio buttons for Yes and No.
- Subject:** Text input field.
- Date:** Date and time pickers, with a 'Show 15 min interval' checkbox.
- Mileage:** Text input field.
- Notes:** Text area.
- Checklist:** Checklist area with a 'Delete' button.
- Attachments:** Section with a 'New' button.
- Lead/Opportunity:** Text input field.
- Campaign:** Text input field.
- Issue:** Text input field.

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
-  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.

SalesLink														
UPTAKE		Sales Reps		ON THE GO	CUSTOMERS	PIPELINE								
Overdue Activities												Export		
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	5019156	Fara Uptake	fara's uptake	test activity add	Test — Lead w/ Activity	182456			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	Hebejsbejsn(Y@@&\$);(;&/:'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
		644994	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.

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.

UPTAKE		SalesLink Sales Reps		ON THE GO	CUSTOMERS	PIPELINE			Customers Not Contacted	
From Jan 01, 2019		To Mar 20, 2019		Submit						Export to Excel
Customer Number	Customer Name	Branch	Division	Phone#	Address	Location	County			
1836002	ABX MECHANICAL SERVICES INC	00	G	2121068563	984 North Rocky Old Freeway	Ballston Spa		Add an Activity		
1217031	ACB WELL DRILLING INC	00	G	2121070980	880 White Milton St.	Paulden		Add an Activity		
1827450	ACM MECHANICAL SERVICES INC		G	2121007852	266 South Rocky Fabien Drive	Weyauwega		Add an Activity		
1375300	AEA CONSTRUCTION INC	00	G	2121092303	115 South White Nobel Blvd.	Big Sky		Add an Activity		
1811329	AFA WELL DRILLING INC	00	G	2121123443	737 North New Drive	Wakeman		Add an Activity		
1519445	AFR CONSTRUCTION INC	12	G	2121075002	481 North Green New Drive	Sedgwick		Add an Activity		
1570599	AFV CONSTRUCTION INC	00	G	2121099285	860 North Green Hague Freeway	Geary		Add an Activity		
1018560	AGB CONTRACTOR LTD	00	G	2121007362	31 South White Hague Freeway	Jay		Add an Activity		
1160755	AHC CONTRACTOR LTD	00	G	2121123432	363 West White Old St.	Ashport		Add an Activity		
1469802	AHL CONSTRUCTION INC	00	G	2121035781	542 Second Way	Whipple		Add an Activity		
1316254	AIU WELL DRILLING INC	00	G	2121097895	734 Oak Street	Johnstown Center		Add an Activity		
1518944	AKG CONSTRUCTION INC	00	G	2121107146	583 South Rocky Old St.	Weyauwega		Add an Activity		
1193950	ANM WELL DRILLING INC		G	2121117583	657 White Milton Drive	Wakeman		Add an Activity		
1420000	ANO WELL DRILLING INC	00	G	2121085130	128 West Rocky New St.	Ashport		Add an Activity		
1672001	AOC EXCAVATING & UNDERGROUND	00	G	2121030851	230 South Rocky Milton Road	Lime Ridge		Add an Activity		
1266065	AOD WELL DRILLING INC	10	G	2121003245	339 New Way	Big Flat		Add an Activity		
1539625	APE EXCAVATING & UNDERGROUND	00	G	2121078668	402 South Hague Road	Rupert		Add an Activity		
1288751	AQF WELL DRILLING INC	00	G	2121012733	548 North White Clarendon Boulevard	Toppenish		Add an Activity		
1154700	AQP MECHANICAL SERVICES INC	00	G	2121086154	228 North Rocky New Avenue	Amity		Add an Activity		
1045938	AQU CONTRACTOR LTD	00	G	2121077645	283 East Rocky New Boulevard	Coon Rapids		Add an Activity		
1864950	ARA CONTRACTOR LTD		G	2121098530	268 South Green Cowley Drive	Huntingdon		Add an Activity		
1302075	ARF WELL DRILLING INC	00	G	2121010258	375 East Oak Boulevard	Westby		Add an Activity		
1280448	ASC CONSTRUCTION INC	00	G	2121119435	470 South Rocky Fabien Street	West Pawlet		Add an Activity		
1769073	ATJ MECHANICAL SERVICES INC	00	G	2121020086	299 West White First Blvd.	Beckemeyer		Add an Activity		
1566563	AUC EXCAVATING & UNDERGROUND	00	G	2121026944	92 West Green Old Boulevard	Merrionette Park		Add an Activity		
1052400	AUT CONTRACTOR LTD		G	2121016109	190 West Oak Freeway	Attu		Add an Activity		
1781181	AVF CONTRACTOR LTD	13	G	2121004535	758 East Rocky Milton Avenue	Santa Fe Springs		Add an Activity		
1435344	AWW CONSTRUCTION INC	00	G	2121003218	960 South White Cowley Way	Birds		Add an Activity		
1056000	AYS CONTRACTOR LTD		G	2121013149	844 North Rocky Milton St.	Lime Ridge		Add an Activity		
1409223	AZO CONSTRUCTION INC	00	G	2121082032	781 Green Old Road	West Sparta		Add an Activity		
1818040	BBD WELL DRILLING INC	00	G	2121078216	220 East White Old Drive	Alkins		Add an Activity		
1328850	BBQ WELL DRILLING INC	00	G	2121079843	173 North Clarendon Parkway	Blue Canyon		Add an Activity		
1641610	BCA EXCAVATING & UNDERGROUND	00	G	2121085864	758 East Oak Road	Chanhassen		Add an Activity		
1258775	BDL WELL DRILLING INC	00	G	2121007381	317 South Rocky Oak Street	West Barnstable		Add an Activity		
1653525	BDJ MECHANICAL SERVICES INC		G	2121124814	30 West Green Second St	Hays		Add an Activity		

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.

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.

03/20/19 - Today -

KZY WELL DRILLING INC (1264663)

- Your last activity for this customer with an open opportunity (OppNo 143621) was on 2018-05-09 (315 days ago)
- There is an opportunity (OppNo 143621) past its delivery date (6/2017)

QPG WELL DRILLING INC (1265779)

- Your last activity for this Par 4 customer was on 2018-06-06 07:00:00 (267 days ago)

ZVF WELL DRILLING INC (1266150)

- Your last activity for this Par 24 customer was on 2018-04-10 07:00:00 (344 days ago)
- There is an opportunity (OppNo 140489) past its delivery date (1/2017)
- There is an opportunity (OppNo 140492) past its delivery date (1/2017)
- There is an opportunity (OppNo 135973) past its delivery date (6/2016)
- Your last activity for this customer with an open opportunity (OppNo 135973) was on 2018-04-10 (344 days ago)
- Your last activity for this customer with an open opportunity (OppNo 140489) was on 2018-04-10 (344 days ago)
- Your last activity for this customer with an open opportunity (OppNo 140492) was on 2018-04-10 (344 days ago)

BHK MECHANICAL SERVICES INC (1266175)

- Your last activity for this Par 6 customer was on 2013-12-02 00:00:00 (1934 days ago)

WWQ WELL DRILLING INC (1286251)

- Your last activity for this Par 4 customer was on 2018-12-08 07:00:00 (102 days ago)
- Your last activity for this customer with an open opportunity (OppNo 144753) was on 2018-12-08 (102 days ago)
- There is an opportunity (OppNo 144753) past its delivery date (9/2017)

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

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.

Purpose	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total
Submitted Quote		1											1
Total: 1 record(s)		1											1

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.

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.

SalesLink Sales Reps																	
ON THE GO CUSTOMERS PIPELINE																	
Last Customer Activities																	
All Customers (221) Current Month (0) Previous Month (0) Within One Year (148) Over One Year (128) All Activities (212) No Activities (6)																	
1 2 3 4 5 Next > Last >> (1 To 50 of 221) Export																	
Cust #	Customer	City States	Zip Code	Phone	PAR	Last Face to Face Activities						Last Other Activities					
						Date	Contact	Notes	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						
8002720	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 commodo magna.									
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 commodo magna.	Sep 01, 2018	Jolene Mccall	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est id aliquet. Morbi ut commodo magna.						
1353610	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						
1353150	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, vitae suscipit	Nov 21, 2018	Taniasha 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	ALW 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 velit									
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 Elyn	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, 2016	Carla Fields	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tristique auctor est id aliquet. Morbi ut commodo magna. Cras ultr	Sep 22, 2016	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, acel						

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.

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.	POPS%	OLGA Service Opport.	POPS%
1207400	ACI WELL DRILLING INC	Mediapolis	G			5	5	5								15	4	11	MSR			679				
8002720	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	BCK 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	BFF 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:

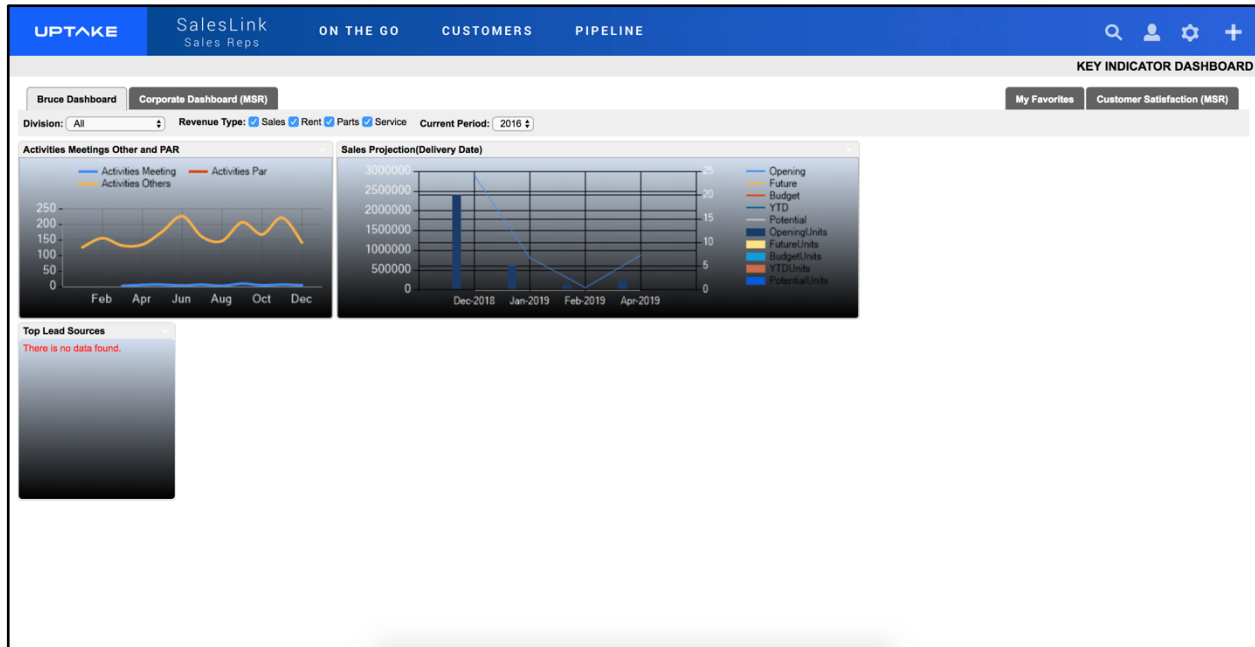
1. Select the fields you want to filter by.
2. Select how far back in time you want to filter.
3. Click the **[Filter]** button.

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

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.

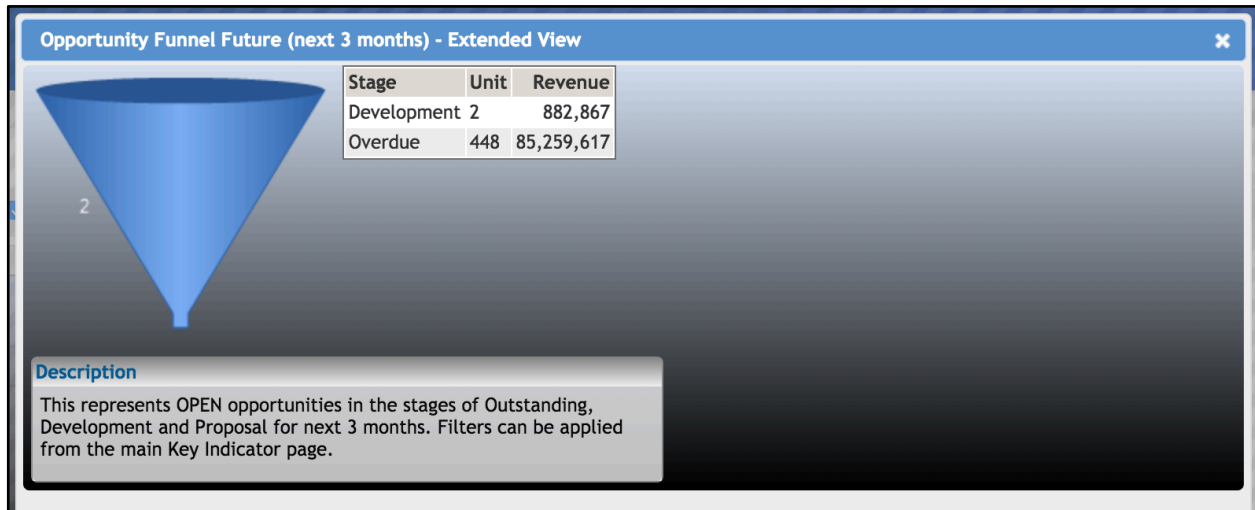
Add to My Favorites

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.

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.

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.

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.

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 Y	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 282	124872	Dec 19, 2017	1	Medium	50,000	Development	Dec 19, 2017		
160889	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	DLB 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	238,000	Development	Nov 27, 2017	Other	
160549	Opp		NON-DBS	ALLI 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	124688	Nov 22, 2017	1	Medium	162,000	Development	Nov 22, 2017		
160461	Opp		1045950	FXW CONTRACTOR LTD	G	Sales	2018	Dec			Tabitha Mokee	BCP Track Type D3	124670	Nov 17, 2017	1	Medium	58,000	Development	Nov 17, 2017	Other	
160407	Opp		1859312	JLB EXCAVATING & UNDERGROUND	G	Sales	2018	Dec			Randy Rusco	Mini Excavators 308	124656	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	
160347	Opp		1422200	VYU MECHANICAL SERVICES INC	G	Sales	2018	Nov			Maria	Work Tools WT-	124638	Nov 14, 2017	1	Medium	120,000	Development	Nov 13, 2017	Other	

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.

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.

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.

Source	12 Months back				12 Months Forward												Rolling 12 Month(s) Total	Beyond 12 Months	Unknown	Total
	Won	Lost	No Deal	Total	2019															
					Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	2020					
Backlog																				
Branch Event																		1	1	
Buyer Zone																		48,178	48,178	
Call-In Inquiry																		1	1	
Campaign response																		189,000	189,000	
CAT Leads																		17	17	
Condition Monitoring																		2,435,407	2,435,407	
Counter Sales																				

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:

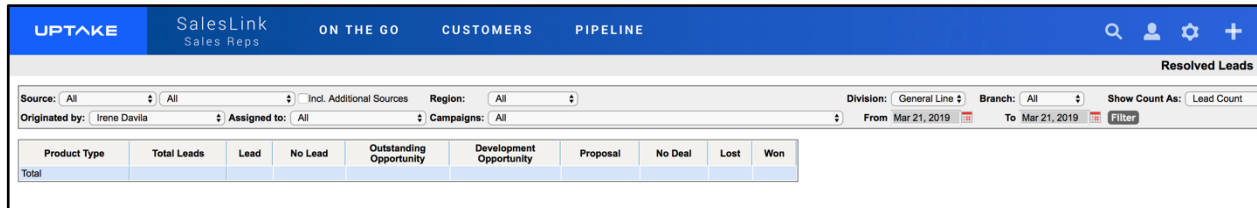
1. Select the fields you want to filter by.
2. Select a date range to filter by.
3. Click the **[Filter]** button.

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.

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.



Product Type	Total Leads	Lead	No Lead	Outstanding Opportunity	Development Opportunity	Proposal	No Deal	Lost	Won
Total									

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.

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.

UPTAKE		SalesLink Sales Reps		ON THE GO	CUSTOMERS	PIPELINE				Customer List
A - E F - J K - O P - T U - Z 0 - 9 All <input checked="" type="checkbox"/> Customer <input type="checkbox"/> Prospect										
Cust #	Customer	Phone	Address	County	City/State	Postal Code	Country	Created On	Export	
1207400	ACI WELL DRILLING INC	2121004308	606 East Green Fabien Avenue	LLN	Mediapolis	24546	United States	Oct 19, 1987	Add an Activity	
1298500	AFN WELL DRILLING INC	2121008944	886 South Milton Boulevard	CIN	Sandoval	25101	United States	Oct 19, 1987	Add an Activity	
1353615	AFR WELL DRILLING INC	2121116709	786 South Oak Boulevard	CIN	River Sioux	44120	United States	Sep 01, 1987	Add an Activity	
1353155	AML WELL DRILLING INC	2121018791	504 West Nobel Parkway	FXH	La Prairie	26834	United States	Jan 10, 2000	Add an Activity	
1669700	ARI CONTRACTOR LTD	2121002957	695 Green Hague Avenue	WUG	Rhodes	25344	United States	Nov 05, 1987	Add an Activity	
1483860	ATE CONSTRUCTION INC	2121073915	286 West White Hague Boulevard	GKJ	Floral City	47073	United States	May 29, 1990	Add an Activity	
1839330	AUW CONTRACTOR LTD	2121123178	418 North Green First Blvd.	LLN	Barrineau Park	25437	United States	Jul 29, 1996	Add an Activity	
1451248	BBF CONSTRUCTION INC	2121009533	870 North Green Clarendon Parkway	FXH	Brocket	27088	United States	Nov 15, 2001	Add an Activity	
1543945	BCX EXCAVATING & UNDERGROUND	2121038101	757 Green Milton Way	FXH	Raymore	25264	United States	Jun 07, 2013	Add an Activity	
1137510	BDC CONTRACTOR LTD	2121019297	53 West Nobel Avenue	BAP	Milledgeville	29760	United States	Dec 07, 2010	Add an Activity	
1132025	BDS CONTRACTOR LTD	2121005211	763 East Clarendon Boulevard	WUG	North Glen Elynn	26862	United States	Dec 04, 2006	Add an Activity	
1286200	BFZ WELL DRILLING INC	2121010148	181 South Rocky Old Parkway	AVU	Jasmine Estates	26827	United States	Oct 19, 1987	Add an Activity	
1286175	BHK MECHANICAL SERVICES INC	2121015668	990 West Green Second Freeway	AVU	Jasmine Estates	25938	United States	Feb 18, 2005	Add an Activity	
1329275	BUT WELL DRILLING INC	2121003299	926 West White Oak St.	WUG	Harbor Bluffs	26266	United States	Mar 22, 1988	Add an Activity	
1280525	BVM WELL DRILLING INC	2121044876	393 West Old Freeway	CIN	Hebron Estates	32019	United States	Jul 12, 2006	Add an Activity	
1823600	BWN MECHANICAL SERVICES INC	2121111596	56 North Green First St.	LLN	Camuy	25315	United States	Dec 05, 1990	Add an Activity	
1217800	CKI CONSTRUCTION INC	2121007591	284 West White Second Boulevard	FXH	West Ishpeming	26208	United States	Oct 19, 1987	Add an Activity	
1145004	CLI CONTRACTOR LTD	2121007591	242 North White Milton Drive	GKJ	Floral City	26289	United States	Aug 28, 2003	Add an Activity	
1854550	CNY MECHANICAL SERVICES INC	2121007620	520 West White New Boulevard	CIN	Turtle Lake	26253	United States	Jul 28, 2000	Add an Activity	
1786349	CPF MECHANICAL SERVICES INC	2121007614	469 West Milton Way	FXH	Marthaville	24810	United States	Jan 23, 2013	Add an Activity	
1541825	QCL EXCAVATING & UNDERGROUND	2121007619	368 South Rocky Old Street	LLN	Troutville	26299	United States	Feb 22, 2017	Add an Activity	
1287550	CUX WELL DRILLING INC	2121005512	99 West Milton Avenue	LLN	Troutville	28749	United States	Nov 04, 1987	Add an Activity	
1691550	DCL EXCAVATING & UNDERGROUND	2121007566	823 South Green Falken St.	LLN	Wild Cherry	26301	United States	Oct 19, 1987	Add an Activity	
1710845	DKK MECHANICAL SERVICES INC	2121004099	707 East Rocky Cowley Avenue	CIN	Cross Plains	29504	United States	May 07, 2012	Add an Activity	
1184373	DDY CONTRACTOR LTD	2121004706	784 North White Cowley Boulevard	KNH	Alzada	27711	United States	Sep 19, 2013	Add an Activity	
1694953	DIJ EXCAVATING & UNDERGROUND	2121003088	929 North Rocky Hague Parkway	FXH	West Ishpeming	25681	United States	Aug 17, 2000	Add an Activity	
1508900	DLD WELL DRILLING INC	2121007570	323 North Nobel Way	CIN	Ohatchee	26235	United States	Oct 20, 2004	Add an Activity	
1570653	DTD MECHANICAL SERVICES INC	2121009173	696 West Green Old Avenue	LLN	Swiftwater	24913	United States	Dec 12, 1996	Add an Activity	
1118000	DUB MECHANICAL SERVICES INC	2121008481	548 East Rocky Oak St.	LLN	Beemerville	28144	United States	Oct 19, 1987	Add an Activity	
1885655	EBA EXCAVATING & UNDERGROUND	2121007614	97 Green Old Blvd.	FXH	Marthaville	24810	United States	Jun 28, 1999	Add an Activity	
1437911	EBV CONSTRUCTION INC	2121007191	254 South Second Boulevard	WUG	Colleyville	25972	United States	Dec 19, 1989	Add an Activity	
1163680	EEB CONTRACTOR LTD	2121004431	19 West White First Parkway	GKJ	Bell Buckle	25352	United States	Aug 03, 2006	Add an Activity	
1718524	EEO MECHANICAL SERVICES INC	2121002733	606 South Old Boulevard	CIN	River Sioux	41279	United States	Jan 05, 2015	Add an Activity	
1510665	EGY CONSTRUCTION INC	2121004731	975 East White Oak Way	FXH	Leighton	26194	United States	Oct 20, 2014	Add an Activity	
1295685	EHT WELL DRILLING INC	2121007583	783 South Green Clarendon St.	LLN	Mediapolis	26284	United States	Dec 29, 2015	Add an Activity	

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.

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.

The screenshot displays the 'Customer Information - Division G' page for 'ACI WELL DRILLING INC (1207400)'. The page header includes 'UPTAKE SalesLink Sales Reps' and navigation tabs for 'ON THE GO', 'CUSTOMERS', and 'PIPELINE'. The customer details section shows 'Terms Code: Charge(2)' and an 'Edit Tasks' dropdown menu. The 'Billing Address' and 'Physical Location' are both listed as '606 East Green Fabien Avenue, Mediapolis 24546, USA'. The 'Division Details' section includes 'Size: 2 - 5 MACHINES (SS)' and 'Ind. 1: GENERAL GOVERNMENT, NEC (9199)'. The 'Expenditures (YTD)' section shows 'Sales: 0', 'Rentals: 0', 'Lease: 0', 'Parts: 0', 'Service: 0', and 'Misc: 0'. The 'Parent & Child Companies' section has an 'Assign Parent or Child' button. The 'Influencers' section lists 'Mike Page' and 'Cristina Jensen' with their respective addresses and roles, and an 'Add New' button.

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.

Customers Segmentation

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

The screenshot shows the 'Customer Profiles' page in the Uptake SalesLink system. At the top, there are navigation tabs for 'ON THE GO', 'CUSTOMERS', and 'PIPELINE'. Below the navigation, there are filters for County, Ind Group, and Ind Code. The main content area is divided into two summary tables: MSR and PSSR, and a large detailed customer list table.

MSR Summary Table:

	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 Summary Table:

	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 #	D I V	Customer	Equips	PS	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	AIJW CONTRACTOR LTD															
1451248	G	BBF CONSTRUCTION INC	B 1	B 4				11								1,408	932
1540945	G	BCK EXCAVATING & UNDERGROUND						2								2,164	156
1137510	G	BDC CONTRACTOR LTD											2,000	109,200	0	156	8,925
1132025	G	BDS CONTRACTOR LTD						1								6,825	
1268200	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								3							
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								17,093	2,744
1854550	G	CNY MECHANICAL SERVICES INC						1		1		229,150	124,500			0	(1,929)
1796349	G	CPF MECHANICAL SERVICES INC															
1541825	G	CDL EXCAVATING & UNDERGROUND								2							
8016757	G	CTH EXCAVATING & UNDERGROUND															
1287550	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.

- **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.

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.

SalesLink														ON THE GO		CUSTOMERS		PIPELINE		Customers by Counties Summary			
Sales Reps																							
County <input type="checkbox"/> Country		Division: All Divisions												<input checked="" type="checkbox"/> Customers <input type="checkbox"/> Prospects									
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	OCC	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.

Territory Changes

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

Account Changes (From February 21, 2019 to March 21, 2019)					
Removed accounts (De-assigned or deleted)					
Date	DIV	Cust #	Customer	Status	Current Sales Reps
No accounts were found.					
Added accounts (Re-Assigned or New accounts)					
Date	DIV	Cust #	Customer	Status	Current Sales Reps
No accounts were found.					

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.

Plan List												
Region: Watson, Kathy Sales Rep: Irene Davila Annual Status: Select All Year: Select All Filter												
Region	Sales Rep	Customer	DIV	Year	EQ Target	PS Target	Rent Target	Annual Status	Quarter 1	Quarter 2	Quarter 3	Quarter 4
No Plans Found.												

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.

Unassigned Accounts

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

		Customer Accounts		
Branch	ST No	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.

Accounts Receivable

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

Note: Numbers include Accounts Receivable for all divisions and exclude unapplied cash.

Division: All

<input checked="" type="checkbox"/> Total	<input checked="" type="checkbox"/> Equipment	<input checked="" type="checkbox"/> Rental	<input checked="" type="checkbox"/> Service	<input checked="" type="checkbox"/> Parts	<input checked="" type="checkbox"/> Misc						
Cust #	Customer	Outstanding	0-30 days	31-60 days	61-90 days	Over 90 days	Total				
1298500	AFN WELL DRILLING INC	1,525.19	279.95	24.94		-717.05	1,109.03				
1669700	ARI CONTRACTOR LTD	271.34	2,149.26		24.94	-8,000.00	-5,579.40				
1451248	BBF CONSTRUCTION INC			855.77	76.00		931.77				
1137510	BDC CONTRACTOR LTD	4,482.50	4,482.50				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	198.67			494.48				
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				311.81				
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	375.49	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				
1229654	GVA WELL DRILLING INC	523.42	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	HJL CONTRACTOR LTD	3,120.88	-200.89	4,135.44		-3,802.57	3,252.84				
1512800	IBH CONSTRUCTION INC	2,944.00					2,944.00				
1878480	IYW PAVING	75,854.98	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.

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.

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.

Date Request Made	Customer Name	Cust #	Request Type
No update requests were found for this customer			
Total Request(s): 0			

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.

Request Type	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
There were no requests entered.													
Total													

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.

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.

Assigned To	0 to 7 days	8 to 15 Days	16 to 30 days	30+ days	Total
Irene Davila				2	2
Total:				2	2

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.

Issue Details

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

The screenshot displays the 'Issue Details' page for issue number 106012. The header includes the Uptake logo, 'SalesLink Sales Reps', and navigation tabs for 'ON THE GO', 'CUSTOMERS', and 'PIPELINE'. The customer information is for 'ACI WELL DRILLING INC (1207400)'. The issue details section shows the following information:

- Customer / Contact:** ACI WELL DRILLING INC (1207400), Division: G - General Line, Branch: Branch03
- Address:** (fields for Address, City, State, Postal Code, Country, City, Contact, Phone, Fax, Email)
- Details:** Product: Phone Call, Priority: High, Status: Open, Source: Phone Call, Date Opened: Feb 06, 2019, Days Open: 44, Root Cause: (empty), Originator: Irene Davila, Functional Area: (empty)
- Product Type:** Attachment, Brand: (empty), Serial No: ubbj, Location: jbbgh
- Model:** CT - CAT Vocational Truck
- Subject:** tests
- Description:** Dvtdb
- Resolution:** (empty)

Below the details, there are sections for 'Assignments', 'Notes', 'Activities', and 'Attachments', each with a 'New' button and a 'Reassign' button. The 'Assignments' section shows 'No Data Available'.

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.

The screenshot displays the 'Outstanding Issues Assigned to Me - By Type/Reason' page. The page includes a filter section with the following settings:

- Priority:** Low, Medium, High, Urgent
- Source:** Customer Survey, Email, In Person, Phone Call, eBusiness Portal, CAT Survey, Other Survey
- Division:** All
- Branch:** All
- Issue:** Open
- Originator:** All
- Opened From:** Mar 22, 2014
- To:** Mar 22, 2019

The table below shows the following data:

Type/Reason	0 to 7 days	8 to 15 Days	16 to 30 days	30+ days	Total
Performance				1	1
Total:				1	1

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

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.

The screenshot displays the 'Outstanding Issues Originated By Me - By Assigned To' page. At the top, there are navigation tabs: 'Assigned To' and 'Type/Reason'. Below these are filter options for Priority (Low, Medium, High, Urgent), Type (Invoice, Product, Services, Other), Source (Customer Survey, Email, In Person, Phone Call, eBusiness Portal, CAT Survey, Other Survey), Division, and Branch. There are also date range filters for 'Opened From' and 'To'. A 'Filter' button and an 'Export' button are visible. The table below shows the following data:

Assigned To	0 to 7 days	8 to 15 Days	16 to 30 days	30+ days	Total
Irene Davila				2	2
Total:				2	2

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.

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
8007574	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
8016758	XDH CONSTRUCTION INC	Lost - Participated	4/2018	Davila, Irene	6/9/2018		1	N	S	98 E351	5	G-303.5	48000	57000	0782	LANDSCAPING SERVICES (155) (155)	Price
8016837	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
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
1010345	ZJL CONTRACTOR LTD	Lost - Participated	4/2018	Davila, Irene	6/9/2018		1	N	S	CA CX558	5	G-305	59000	78000	1799	RESIDENTIAL SITE DEVELOPMENT (241) (241)	Price
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
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
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
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
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
1105595	FWP CONTRACTOR LTD	Lost - Participated	1/2019	Davila, Irene	1/7/2019		1	U	S	AA 338EL	F	G-336	180000	250000	1794	COMMERCIAL & PUBLIC SITE DEVELOPMENT (251) (251)	Inventory/Availability
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
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
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
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
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
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
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
1405665	RYD CONSTRUCTION INC	Lost - Participated	6/2018	Davila, Irene	9/9/2018		1	N	S	NN E358	5	G-303.5	47000	57000	1542	RESIDENTIAL SITE DEVELOPMENT (241) (241)	Brand/Dealer Preference
1438000	FFM CONSTRUCTION INC	Lost - Participated	10/2018	Davila, Irene	12/10/2018		1	U	S	WK PC400 LC F 7	F	G-349	279000	449000	1623	COMMERCIAL & PUBLIC SITE DEVELOPMENT (251) (251)	Inventory/Availability

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.

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.

2019 Competitive Info By - All Regions (All Deliveries)															
Reason:	Division:	New/Used:	Sale/Rent:											Filter	Export
All	G	All	All												
Backhoe/Industrial Loaders															
415	AA	98	CA	JD	NN	VO	WK	WL	ZG	Other	Total				
416															
420															
430															
450															
Total:															
Telehandlers															
TH255	AA	98	CA	JD	NN	VO	WK	WL	ZG	Other	Total				
TH406															
TH407															
TH514															
TL642															
TL943															
TL1055															
TL1255															
Total:															
Skid Steer Loaders															
226	AA	98	CA	JD	NN	VO	WK	WL	ZG	Other	Total				
232															
236															
242															
246															
252															
262															
272															
Total:															
Multi-Terrain Loader															
247	AA	98	CA	JD	NN	VO	WK	WL	ZG	Other	Total				
257															
277															
287															
297															
Total:															
Compact Track Loader															
239	AA	98	CA	JD	NN	VO	WK	WL	ZG	Other	Total				

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:

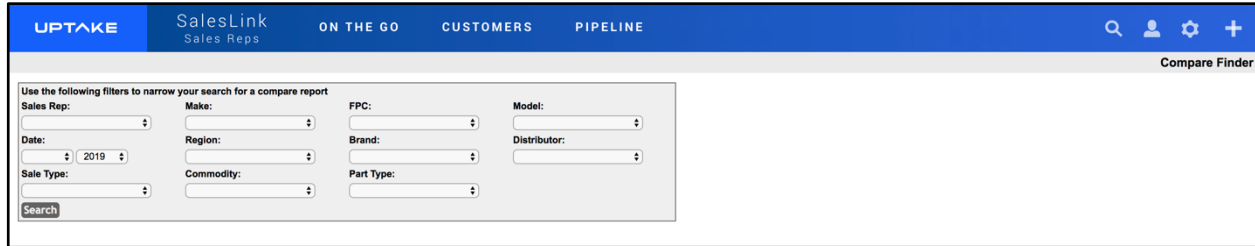
1. Select the fields to filter by at the top of the page.
2. Select a year using the **Year** drop-down menu.
3. Click the **[Filter]** button.

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.

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.

UCC Company Name	Customer Name	Customer No.	County	ZIP	Filing Date	New/Used	Est. Manuf. Year	Manufacturer	Model	SN	Record Status	Rep. Status	Edit
Frank J Fazio & Sons Inc	AFN WELL DRILLING INC	1298500	GLOUCESTER	25101	May 23, 2013	N	2012	DEERE	644-K	0R9G262711	Customer in DBS	Not reviewed	Edit
Frank J Fazio & Sons Inc	AFN WELL DRILLING INC	1298500	GLOUCESTER	25101	Jul 08, 2013	U	2011	SANDVIK	QA-430	0CPC262711	Customer in DBS	Not reviewed	Edit
Frank J Fazio & Sons Inc	AFN WELL DRILLING INC	1298500	GLOUCESTER	25101	Jul 07, 2011	U	2004	DEERE	744-J	0PEP262711	Customer in DBS	Not reviewed	Edit
Michael A Hitchner Hauling	EOG EXCAVATING & UNDERGROUND	1400905	CUMBERLAND	25315	Jul 19, 2012	N	2012	KUBOTA	SVL-90	0YHV93432	Customer in DBS	Not reviewed	Edit
Jersey Construction Inc	FFM CONSTRUCTION INC	1438000	ATLANTIC	25272	Jan 19, 2012	N	2011	CASE	590-SUPER-N	0JSC43556	Customer in DBS	Not reviewed	Edit
Jersey Construction Inc	FFM CONSTRUCTION INC	1438000	ATLANTIC	25272	May 22, 2013	U	2011	CASE	CX-135-SR	0VTN43556	Customer in DBS	Not reviewed	Edit
Jersey Construction Inc	FFM CONSTRUCTION INC	1438000	ATLANTIC	25272	May 09, 2011	U	2004	KOMATSU	WA-380-5	0JYD72225	Customer in DBS	Not reviewed	Edit
Burns Const Of Nj Llc	FJU CONTRACTOR LTD	1136102	BURLINGTON	24692	Apr 10, 2012	U	2007	JLG	G-6-42-A	0VRCE2711	Customer in DBS	Not reviewed	Edit
Burns Const Of Nj Llc	FJU CONTRACTOR LTD	1136102	BURLINGTON	24692	Apr 30, 2012	U	2009	KOMATSU	WB-146-5	0VWH20648	Customer in DBS	Not reviewed	Edit
J P C Service Co	KPT CONSTRUCTION INC	1451246	CAMDEN	24770	Jun 12, 2012	N	2011	KOMATSU	PC-228-USLC-8	0VYS20648	Customer in DBS	Not reviewed	Edit
J P C Service Co	KPT CONSTRUCTION INC	1451246	CAMDEN	24770	Jun 27, 2013	U	2007	VOLVO	L-180-E	0PYX99957	Customer in DBS	Not reviewed	Edit
J P C Service Co	KPT CONSTRUCTION INC	1451246	CAMDEN	24770	Mar 25, 2011	U	2005	KOMATSU	PC-308-USLC-3	0AQN20648	Customer in DBS	Not reviewed	Edit
J P C Service Co	KPT CONSTRUCTION INC	1451246	CAMDEN	24770	Mar 24, 2011	U	2006	VOLVO	EC-330-B-LC	0YCA3556	Customer in DBS	Not reviewed	Edit
J P C Service Co	KPT CONSTRUCTION INC	1451246	CAMDEN	24770	Mar 24, 2011	U	2004	DEERE	850-C	0TRR45538	Customer in DBS	Not reviewed	Edit
J P C Service Co	KPT CONSTRUCTION INC	1451246	CAMDEN	24770	Mar 30, 2011	U	2007	VOLVO	L-120-E	0LB20648	Customer in DBS	Not reviewed	Edit
J P C Service Co	KPT CONSTRUCTION INC	1451246	CAMDEN	24770	Apr 27, 2011	U	2008	VOLVO	SD-100-D	0FWL262711	Customer in DBS	Not reviewed	Edit
J P C Service Co	KPT CONSTRUCTION INC	1451246	CAMDEN	24770	Apr 27, 2011	U	2008	VOLVO	SD-100-D	0FWL262711	Customer in DBS	Not reviewed	Edit
J P C Service Co	KPT CONSTRUCTION INC	1451246	CAMDEN	24770	Jun 23, 2011	U	2007	VOLVO	L-180-E	0GRE20648	Customer in DBS	Not reviewed	Edit
J P C Service Co	KPT CONSTRUCTION INC	1451246	CAMDEN	24770	May 31, 2011	U	2007	VOLVO	L-180-E	0VFE20648	Customer in DBS	Not reviewed	Edit
J P C Service Co	KPT CONSTRUCTION INC	1451246	CAMDEN	24770	May 31, 2011	U	2007	DEERE	450-J	0VUH58265	Customer in DBS	Not reviewed	Edit
Elk Pipeline Incorporated	KQZ WELL DRILLING INC	1213550	GLOUCESTER	25992	Jan 26, 2011	U	2007	CASE	580-M	0YH20648	Customer in DBS	Not reviewed	Edit
Elk Pipeline Incorporated	KQZ WELL DRILLING INC	1213550	GLOUCESTER	25992	Dec 13, 2011	N	2011	CASE	580-N	0GC443556	Customer in DBS	Not reviewed	Edit
Elk Pipeline Incorporated	KQZ WELL DRILLING INC	1213550	GLOUCESTER	25992	Dec 13, 2011	N	2011	CASE	580-N	0JPB43556	Customer in DBS	Not reviewed	Edit
Elk Pipeline Incorporated	KQZ WELL DRILLING INC	1213550	GLOUCESTER	25992	Dec 13, 2011	N	2011	CASE	580-N	0XYH43556	Customer in DBS	Not reviewed	Edit
Elk Pipeline Incorporated	KQZ WELL DRILLING INC	1213550	GLOUCESTER	25992	Nov 02, 2012	N	2012	CASE	580-N	0FAX20648	Customer in DBS	Not reviewed	Edit
Elk Pipeline Incorporated	KQZ WELL DRILLING INC	1213550	GLOUCESTER	25992	Nov 02, 2012	N	2012	CASE	580-N	0FCA20648	Customer in DBS	Not reviewed	Edit
Elk Pipeline Incorporated	KQZ WELL DRILLING INC	1213550	GLOUCESTER	25992	Nov 02, 2012	N	2012	CASE	580-N	0OEE20648	Customer in DBS	Not reviewed	Edit
W J V General Contracting Co	MQO MECHANICAL SERVICES INC	1832880	SALEM	25750	Mar 27, 2012	U	2001	CASE	580-SUPER-M	0TDF20718	Customer in DBS	Not reviewed	Edit
W J V General Contracting Co	MQO MECHANICAL SERVICES INC	1832880	SALEM	25750	Mar 27, 2012	U	2004	CASE	590-SUPER-M	0VEF93489	Customer in DBS	Not reviewed	Edit
W J V General Contracting Co	MQO MECHANICAL SERVICES INC	1832880	SALEM	25750	Jan 06, 2012	N	2012	TAKEUCHI	TL-240	0JKJ43556	Customer in DBS	Not reviewed	Edit
W J V General Contracting Co	MQO MECHANICAL SERVICES INC	1832880	SALEM	25750	Jan 17, 2012	N	2012	KUBOTA	U-35	0VWC26272	Customer in DBS	Not reviewed	Edit
W J V General Contr Llc	MQO MECHANICAL SERVICES INC	1832880	SALEM	24708	Jan 05, 2011	U	2003	CASE	590-SUPER-M	0VEF93489	Customer in DBS	Not reviewed	Edit
Asphalt Paving Corporation	OZZ CONTRACTOR LTD	1054450	GLOUCESTER	25245	May 30, 2013	N	2013	MAULDIN	1550-D	0ADT43556	Customer in DBS	Not reviewed	Edit
A P Construction Inc	PXW CONTRACTOR LTD	1045950	CAMDEN	24770	Jun 01, 2012	N	2012	VOLVO	ABG-8820	0NSM262711	Customer in DBS	Not reviewed	Edit
A P Construction Inc	PXW CONTRACTOR LTD	1045950	CAMDEN	24770	Jun 01, 2012	N	2012	VOLVO	ABG-8820	0VEG93489	Customer in DBS	Not reviewed	Edit
Benigno & Ciro Inc	SHD CONTRACTOR LTD	1092450	ATLANTIC	25272	Jun 01, 2011	N	2011	CASE	580-SUPER-N	0VH43556	Customer in DBS	Not reviewed	Edit

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.

UCC Detail Page

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

UCC Detail Information

AFN WELL DRILLING INC (1298500)
Tel: 2121008944 City: Sandoval Branch: Acct Type: DBS Business Type: End-User

[Edit the CAT UCC information](#) [Add to lost sales](#) [Add to equipment population](#) [Add to prospects](#)

UCC Detail

SalesLink Division: General Line - G
SalesLink Status Description: Customer in DBS - C
SalesLink Customer Number: 1298500
SalesLink Customer Name: AFN WELL DRILLING INC
SalesLink Serial Number: 0RBQ82711
CAT Product Family: WHEEL LOADER - D
CAT Manufacturer: JOHN DEERE - JD
CAT Competitive: Yes
SalesLink Rep. Status Description: Not reviewed - 0
Buyer Identification Code: A024789
[Save Edits](#) [Cancel Edit](#)

Buyer Company Name: Frank J Fazio & Sons Inc Buyer Address 1: 458 Elwood Ave Buyer City: Hyattville Buyer State Description: NJ Buyer Zip: 25101 Buyer Phone Number: 2121035108 Buyer Fax: 2121032831 Buyer County: GLOUCESTER Buyer SIC Code: 5032 Buyer SIC Description: BRICK STONE AND RELATED MATERIALS	New Or Used Equipment: New Manufacturer Name: DEERE Manufacturer Model: 644-K Equipment Serial Number: 1DW644KZCCE645816 CAIS Est. Year Of Manufacture: 2012 Equipment Value: 231,211 Last Update Date: Aug 21, 2013
Date Of Filing: May 23, 2013 Sale Type: Sale Save Edits Cancel Edit	Secured Party Identifier: A618651 CAIS Secured Party Classification: 60000 Secured Party Name: WELLS FARGO EQT FIN Secured Party City: Claudell Secured Party State Description: MN

UCC notes [Add a note](#)

No notes available

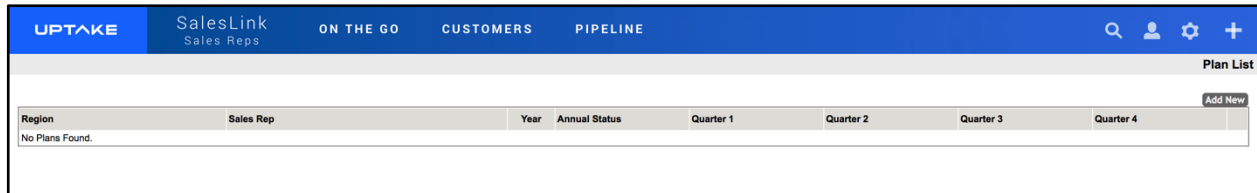
Make all necessary edits to the UCC Details and add any notes by clicking the **[Add a Note]** button, then click **[Save Edits]**.

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

Plans

Territory Plans

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

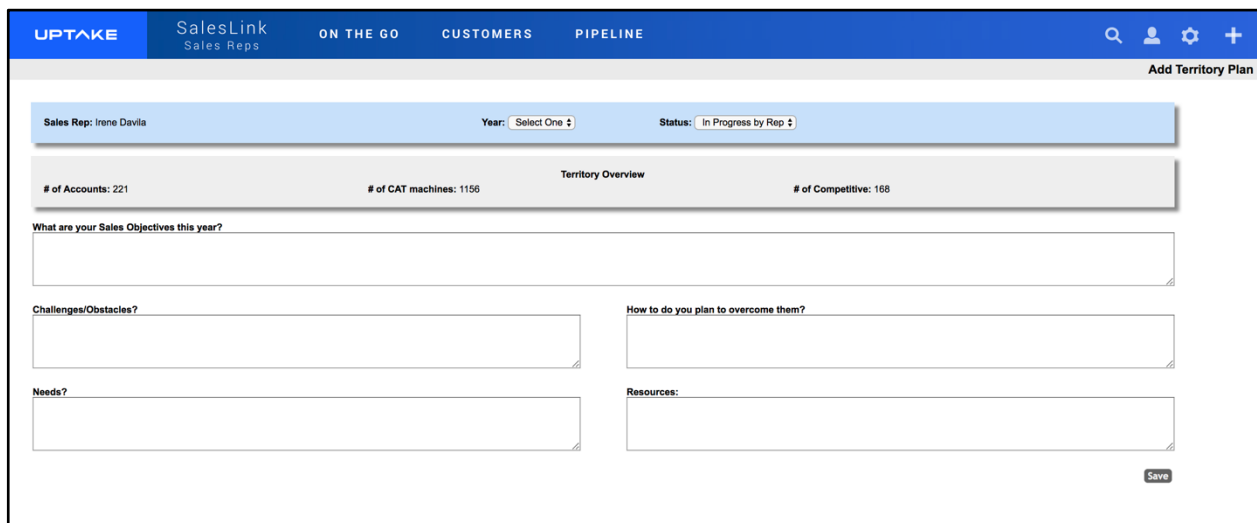


Region	Sales Rep	Year	Annual Status	Quarter 1	Quarter 2	Quarter 3	Quarter 4
No Plans Found.							

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.

Budget

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

Equipment Sales	2017			2018			2019			2016 Init. Forecast		
	Units	Volume	GP%	Units	Volume	GP%	Units	Volume	GP%	Units	Volume	GP%
New	34	4,752,511	9.90	36	6,269,854	8.76	1	58,290	7.66			
New Conversion												
Used	2	129,400	16.22	3	311,880	(61.41)	1	58,000	11.34			
Used Conversion												
RF Conversion												
Test												
Rentals												
EngineeredSolutions												
Total:	36	4,881,911	10.07	39	6,581,734	5.44	2	116,290	9.50			
Rental Revenue												
NPRO (Rental PINS)												
Rentals		1,444	16.00		327,054	16.00		69,787	16.00			
Lease		427,085	16.00		342,344	16.00		30,870	16.00			
Total:		428,529	16.00		669,398	16.00		100,657	16.00			
Grand Total:	36	5,310,440	10.55	39	7,251,132	6.41	2	216,947	12.51			

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]**.

Sales

Performance Profile

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

2019 vs 2018		Division: All Divisions										Year: 2019	
		2019					2018						
		Davila		Rep Avg			Davila		Rep Avg				
Equipment Sales		Units	Volume	GP%	Units	Volume	GP%	Units	Volume	GP%	Units	Volume	GP%
New		1	58,290	7.7	3	340,254	4.6	36	6,269,854	8.8	30	4,398,440	6.8
Used		1	58,000	11.3	2	79,875	14.3	3	311,880	(61.4)	12	679,832	7.7
Other		2	320,000	75.7	2	293,025	41.4	23	2,472,690	16.2	15	1,266,286	20.4
Attachment		2	39,000	64.0	2	22,937	64.2	39	211,642	28.2	23	100,813	18.7
Total:		6	475,290	58.6	9	736,091	22.2	101	9,266,066	8.8	80	6,445,371	9.7
Rental Revenue													
Rentals			70,768			41,257			335,126			726,903	
Lease			30,870			434			342,344			49,096	
Expenses													
Travel and Ent. Exp.													
Auto.													
Ad. & Promotion													
Comm.													
Demo.													
Sales Policy													
Customer Management	All Assigned Customers	Activities	% Contacted	Activities	% Contacted	Activities	% Contacted	Activities	% Contacted	Activities	% Contacted	Activities	% Contacted
210 Customers						0.0	2,087	90.0	418				4.1
Assets Utilization													
Mar 21, 2019													
		Davila					Rep Avg						
Accounts Receivable	Equip. AR over 90 days		50,206.4	(6.3 %)								6,703	(3.9 %)
	Rental AR over 90 days		197,430.6	(33.1 %)								20,751	(26.4 %)
Inventory	Equip. on Reserve (Total)		3,963,175	(61)								414,204	(7)
	Equipment On Demo												
E-Commerce													
YTD (Mar 22, 2019) vs YTD 3 Months Ago (Dec 22, 2018)													
		Davila			Rep Avg			Davila			Rep Avg		
Parts Direct + Service		0			3,849			2,773				54,869	
Parts Online		0			222			0				1,758	
% of Online		9			5.4			9				3.1	

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.

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.

UPTAKE	SalesLink Sales Reps		ON THE GO		CUSTOMERS		PIPELINE		Lost Sales (12 Months back)										
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	Dealership Price	Industry Code	Market Segment (PWC)	Reason	
9007574	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
9018758	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
9016837	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
1105695	FWP CONTRACTOR LTD	Lost - Participated	1/2019	Davila, Irene	1/7/2019		1	U	S	AA	338EL	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.

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.

2019 Lost Sales by Model - All Regions (All Deliveries)												
Reason:	Division:	New/Used:	Sale/Rent:									Export
All	G	All	All	<input checked="" type="radio"/> 12 Months back	<input type="radio"/> 2019							
Backhoe/Industrial Loaders												
415	AA	98	CA	JD	NN	VO	WK	WL	ZG	Other	Total	
416												
420												
430												
450												
Total:												
Telehandlers												
TH255	AA	98	CA	JD	NN	VO	WK	WL	ZG	Other	Total	
TH406												
TH407												
TH514												
TL642												
TL943												
TL1055												
TL1255												
Total:												
Skid Steer Loaders												
226	AA	98	CA	JD	NN	VO	WK	WL	ZG	Other	Total	
232												
236												
242												
246												
252												
262												
272												
Total:												
Multi-Terrain Loader												
247	AA	98	CA	JD	NN	VO	WK	WL	ZG	Other	Total	
257												
277												
287												
297												
Total:												
Compact Track Loader												
239	AA	98	CA	JD	NN	VO	WK	WL	ZG	Other	Total	

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).

Latest Work Orders

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

UPTAKE		SalesLink Sales Reps		ON THE GO	CUSTOMERS	PIPELINE												
Status: <input type="checkbox"/> Open <input checked="" type="checkbox"/> Closed <input type="checkbox"/> Invoiced													Latest Work Orders For : Irene Davila					
From: Sep 22, 2018				To: Mar 22, 2019				Division: <input type="checkbox"/> D - Agriculture <input type="checkbox"/> E - Engine <input checked="" type="checkbox"/> G - General Line <input type="checkbox"/> I - International <input type="checkbox"/> P - Perkins Engine <input type="checkbox"/> R - Rental <input type="checkbox"/> X - Truck										
1 2 3 4 5 6 Next > Last >> (1 To 50 of 262)																		
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	QZYD45538	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		
1758000	YVU MECHANICAL SERVICES INC	G	W3368230	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	0DDZK93432			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	YVU MECHANICAL SERVICES INC	G	W8789416	7	AA	328DLCR	0UJY94367	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		887.68	275.00		1,162.68		
1832990	MCK MECHANICAL SERVICES INC	G	W6162971	1	AA	345BL	0SJA62711			I	Jan 18, 2019	Jan 22, 2019		768.00	84.00	852.00		
1719715	WIX MECHANICAL SERVICES INC	G	W0821958	18	AA	308EZCRSB	0JON72225			O	Jan 18, 2019		74.01	952.07	724.00	1,750.08		
1753320	OED MECHANICAL SERVICES INC	G	W0125812	1	AA	980C	0EIP93432		BILLY	I	Jan 18, 2019	Jan 22, 2019		525.00	180.00	705.00		
1529115	GSO CONSTRUCTION INC	G	W8301054	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	0YYW72225	3007		O	Jan 14, 2019		140.60	756.00	597.35	1,493.95		
1878480	IYW PAVING	G	W3696264	18	AA	D6RLGP	0HJD45538		RLGP-1	I	Jan 14, 2019	Jan 22, 2019	369.00	606.50	765.50	1,741.00		
1292847	YYY 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	0JUN72225		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	I	Jan 12, 2019	Jan 20, 2019	369.00	606.50	765.50	1,741.00		
1878480	IYW PAVING	G	W4909514	18	AA	962M	0JYV45538		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	914CZ	0WTJ58265			O	Jan 11, 2019		345.58			345.58		
1756000	YVU MECHANICAL SERVICES INC	G	W7148863	7	AA	328DLCR	0UJY94367	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	W2082349	18	AA	D6RLGP	0JUR93432		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	VV	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.

Commissions

Commissions – Paid: Summary

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

Cutoff Date	Net Paid	Equipment Sale	Rental	Parts and Service	Manual	Total Earned	Base Salary	Guarantee Paid	Balance Owed	Balance Remaining YTD
Jan 31, 2019										
Feb 28, 2019										
Mar 31, 2019										
Apr 30, 2019										
May 31, 2019										
Jun 30, 2019										
Jul 31, 2019										
Aug 31, 2019										
Sep 30, 2019										
Oct 31, 2019										
Nov 30, 2019										
Dec 31, 2019										
Total:	0.00							0.00		

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.

Insights

Campaigns

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

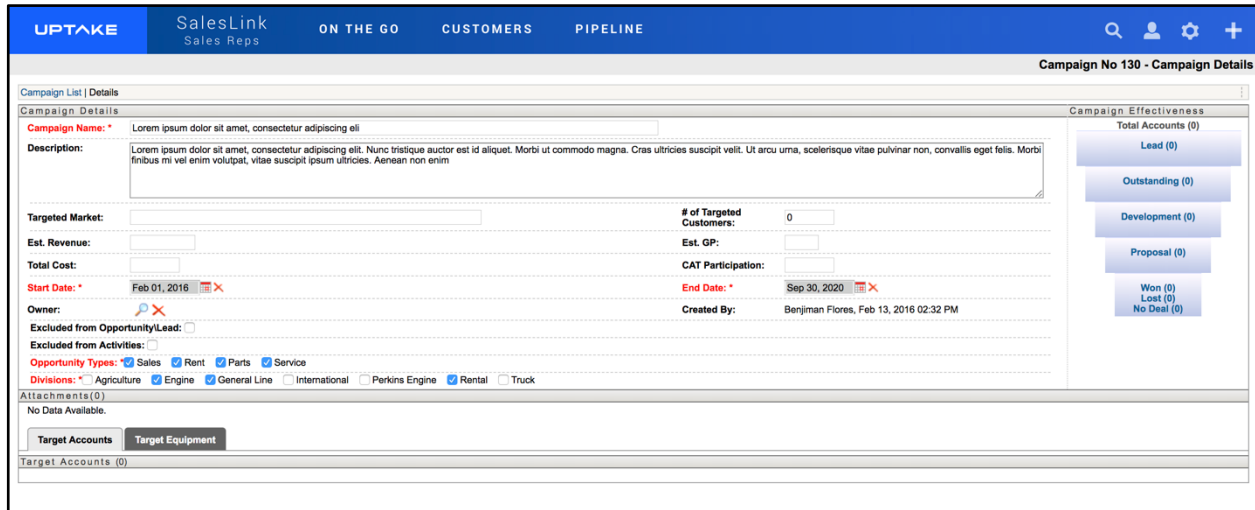
UPTAKE SalesLink Sales Reps ON THE GO CUSTOMERS PIPELINE									
Current Campaigns									
Current Campaigns									
Name	Description	Division(s)	Start Date	End Date	Owner	Created By	Created On	Total Accounts	
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0% Financing - Backhoes & Excavators		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.

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.

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	14		14										0%	0%
2019 Feb	6		5	1									0%	0%
2019 Mar	2		2										0%	0%
2019 Apr	6		6										0%	0%
2019 May	8		8										0%	0%
2019 Jun	9		9										0%	0%
2019 Jul	9		9										0%	0%
2019 Aug	5		5										0%	0%
2019 Sep	8		8										0%	0%
2019 Oct	6		6										0%	0%
2019 Nov	6		6										0%	0%
2019 Dec	10		10										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. 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.

The screenshot shows the SalesLink interface with a table titled "Expiring Warranties - Total". The table has columns for Customer, Activity, Make, Model, Serial #, Current SMU, MSR, PSSR, Type, Description, D I Y, Expire Date, SMU, Selling Facility, Opp No, Stage, Type, Sales Rep, Est Revenue, and a set of action buttons (On Hold, Declined, Activity, Opportunity). The table lists 14 records for various contractors and their equipment warranties.

Customer	Activity	Make	Model	Serial #	Current SMU	MSR	PSSR	Type	Description	D I Y	Expire Date	SMU	Selling Facility	Opp No	Stage	Type	Sales Rep	Est Revenue	On Hold	Declined	Activity	Opportunity		
FWP CONTRACTOR LTD (1105595)		AA	D5K2	0MZD45538	2,988 Hrs on Dec 14, 2017	Irene Davila		Standard	3YR/5000HR PT/HYD CLBR 00	G	Jan 09, 2019	5,000 Hrs	Branch00											
KZO MECHANICAL SERVICES INC (1381225)		AA	AP255EQ	QJSS26272	19 Hrs on Feb 02, 2016	Irene Davila		Standard	3YR/5000HR PT/HYD CLBR 00	G	Jan 12, 2019	5,000 Hrs	Branch07											
VYU MECHANICAL SERVICES INC (1756000)		AA	420F	ODG058265	1,297 Hrs on Oct 17, 2017	Irene Davila		Standard	3YR/5000HR PT/HYD CLBR 00	G	Jan 18, 2019	5,000 Hrs	Branch07											
IYW PAVING (1878480)		AA	D4K2	DOEK45538	973 Hrs on Oct 12, 2017	Irene Davila		Standard	1YR STANDARD W/CAT LABOR	G	Jan 19, 2019	999,999 Hrs	Branch00											
FLM CONTRACTOR LTD (1670790)		AA	420F2	0KTV58265	45 Hrs on Dec 30, 2016	Irene Davila		Standard	1YR STANDARD W/CAT LABOR	G	Jan 20, 2019	999,999 Hrs	Branch00											
UMP EXCAVATING & UNDERGROUND (1128033)		AA	D3K2	UJSY58265	287 Hrs on Dec 11, 2017	Irene Davila		Standard	3YR/5000HR PT/HYD CLBR 00	G	Jan 26, 2019	5,000 Hrs	Branch00											
EEO MECHANICAL SERVICES INC (1716924)		AA	305.5E	0QJC72225	277 Hrs on Jan 12, 2017	Irene Davila		Standard	3YR/3000HR CCE LTD CLBR00	G	Jan 26, 2019	3,000 Hrs	Branch00											
CLI CONTRACTOR LTD (1145004)		AA	420F2	0VRD58265	42 Hrs on Dec 28, 2016	Irene Davila		Standard	1YR STANDARD W/CAT LABOR	G	Jan 28, 2019	999,999 Hrs	Branch00											
QVR CONTRACTOR LTD (1144100)		AA	D4K2	0LNT45538	13 Hrs on Mar 10, 2017	Irene Davila		Standard	1YR STANDARD W/CAT LABOR	G	Jan 28, 2019	999,999 Hrs	Branch00											
VYU MECHANICAL SERVICES INC (1756000)		AA	246D	0GQG45538	377 Hrs on Jun 28, 2017	Irene Davila		Standard	6M/500HR USED PT/HYD CLBR	G	Jan 28, 2019	877 Hrs	Branch07											
LVS CONTRACTOR LTD (1167100)		AA	259D	0GSD72225	0 Hrs on Dec 28, 2016	Irene Davila		Standard	1YR STD CCE W/CAT LABOR	G	Jan 28, 2019	0 Hrs	Branch00											
UMP EXCAVATING & UNDERGROUND (1128033)		AA	914K	0YCS45538	174 Hrs on Sep 13, 2017	Irene Davila		Standard	1YR STANDARD W/CAT LABOR	G	Jan 29, 2019	999,999 Hrs	Branch00											
EHT WELL DRILLING INC (1295885)		AA	303.5E2	0YIS58265	0 Hrs on Dec 29, 2016	Irene Davila		Standard	1YR STD CCE W/CAT LABOR	G	Jan 29, 2019	0 Hrs	Branch00											
LLM MECHANICAL SERVICES INC (1631750)		AA	980M	0IZJ58265	10,836 Hrs on Dec 22, 2017	Irene Davila		Standard	3YR/8000 H PREMIERE CLBR	G	Jan 30, 2019	8,000 Hrs												
Total: 14 record(s)																								

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.

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]**.

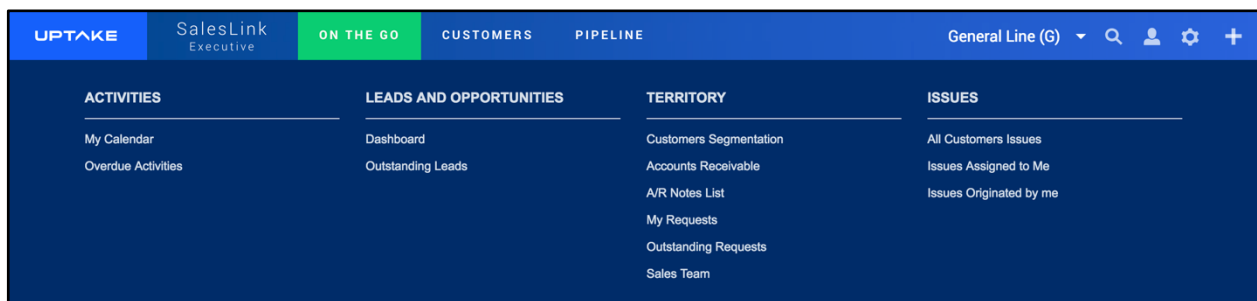
SALESLINK – EXECUTIVE

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

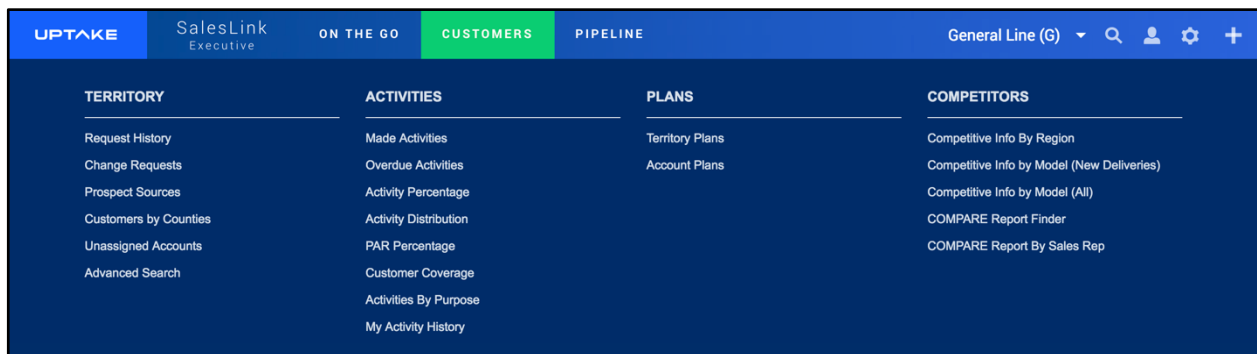
At the top of the screen is a navigation bar that can be accessed from anywhere in the application.

ON THE GO



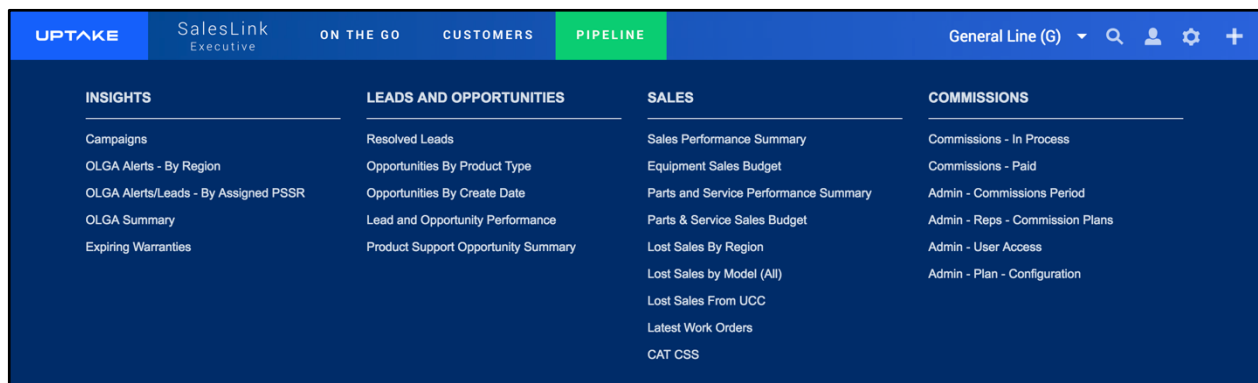
Hover over the ON THE GO tab to access pages related to your Activities, Leads and Opportunities, Territory, and Issues.

CUSTOMERS



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

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



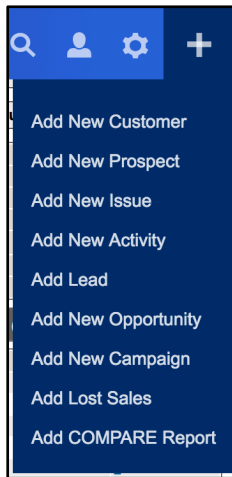
Click on the Profile icon to view/edit your current User Profile information.

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.

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.

SalesLink Executive										ON THE GO				CUSTOMERS		PIPELINE		General Line (G)		Customer Profiles					
View customer: Equipment Potential										profile by: All Regions		All MSRs		County: All Counties		Total Assigned: 6431									
Ind Group: All Industry Groups										Ind Code: All Industry Codes		Customers		Prospects											
MSR										Not Profiled 4383 Non-cust (N): 0 Unknown (U): 0															
										1 (Ours)		2 (Swing)		3 (Theirs)		Total		4 (Acct)		Grand Total					
A (High)										7		24		1		32		0		32					
B (Med)										219		209		75		503		0		503					
C (Low)										314		69		509		892		2		894					
Total										540		302		585		1427		2		1429					
X (Inactive)										45		21		513		579		40		619					
Grand Total										585		323		1098		2006		42		2048					
PSSR										Not Profiled 3999 Non-cust (N): 0 Unknown (U): 0															
										1 (D/M)		2 (W/M)		3 (D/M)		Total		4 (Acct)		Grand Total		Blank			
A (High)										16		13		5		37		11		46		0			
B (Med)										55		66		225		346		197		543		0			
C (Low)										18		76		489		583		660		1243		0			
Total										89		155		722		966		868		1934		0			
X (Inactive)										0		0		15		15		582		597		0			
Grand Total										89		155		737		981		1450		2431		0			
Customer Profile By MSR										Equip Potential (A/B/C)		Equip Type (1/2/3)		PS Potential (A/B/C)		PS Type (1/2/3)									
MSR										A (High)		B (Med)		C (Low)		X (Inactive)		Non-cust		Not Profiled		Unknown		Total	
Blackburn, Gloria										3		102		482		489		0		1701		0		2777	
Davila, Irene										5		39		54		6		0		116		0		220	
Demo, demouser2										0		0		0		0		0		3		0		3	
Demo, uptake2019										0		0		0		3		0		3		0		6	
Durham, Harmony										0		0		0		0		2		0		2		2	
English, Ruth										3		59		73		31		0		224		0		390	
Gilli, Vito										0		0		0		0		0		282		0		282	
Gilmore, Terrance										0		14		36		7		0		132		0		189	
Graham, Kori										0		1		0		0		0		2		0		3	
Gregory, Athena										5		25		14		2		0		38		0		84	
Kennedy, Jasper										0		13		0		1		0		395		0		409	
Long, Nick										0		0		1		0		0		27		0		28	
Lutz, Rafael										0		0		1		1		0		44		0		46	
Mc Cormick, Ruth										0		0		1		0		0		3		0		4	
Mc Mahon, Hugh										0		26		70		15		0		259		0		370	
Mc Mahon, Shad										0		0		2		2		0		8		0		12	
Miles, Theron										0		5		0		0		0		13		0		18	
Nicholson, Nanette										0		4		10		6		0		205		0		225	
Paul, Sonja										8		73		23		11		0		91		0		206	
Payne, Rafael										0		0		1		0		0		3		0		4	
Rosales, Carin										0		0		1		2		0		159		0		162	
Savage, Nyree										0		0		0		1		0		113		0		114	

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.

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.

- **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.

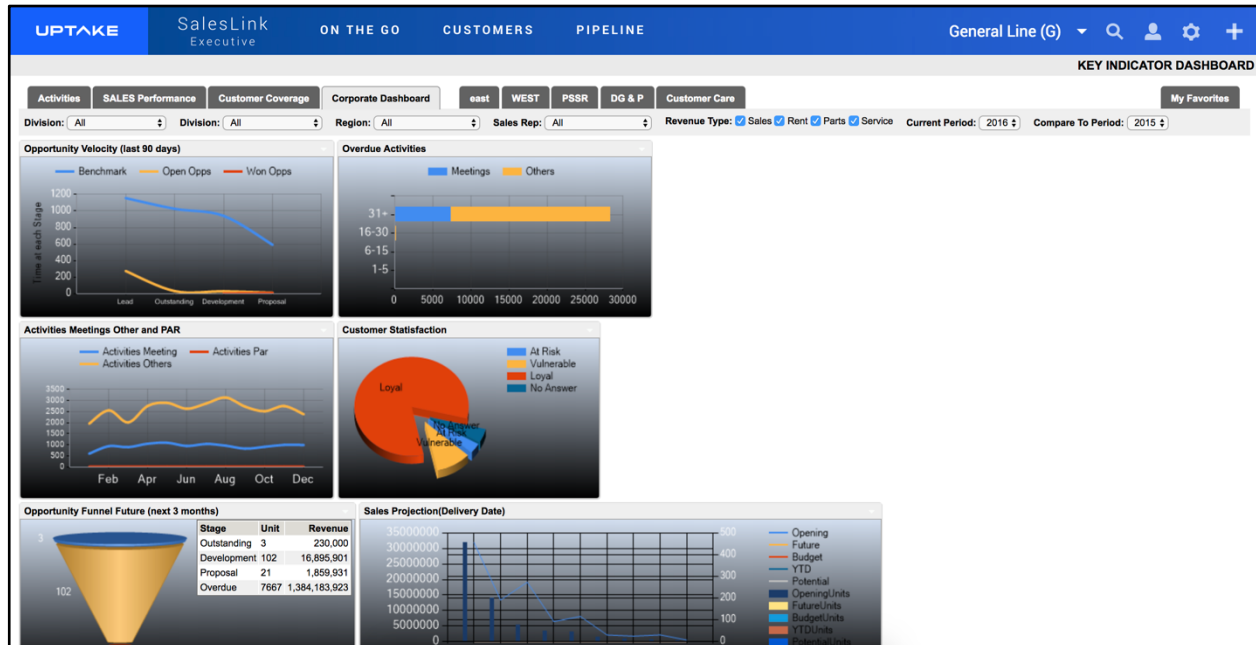
- **Unknown:** The sales rep has not met the customer and is not aware of what the potential is.

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.

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

- 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.

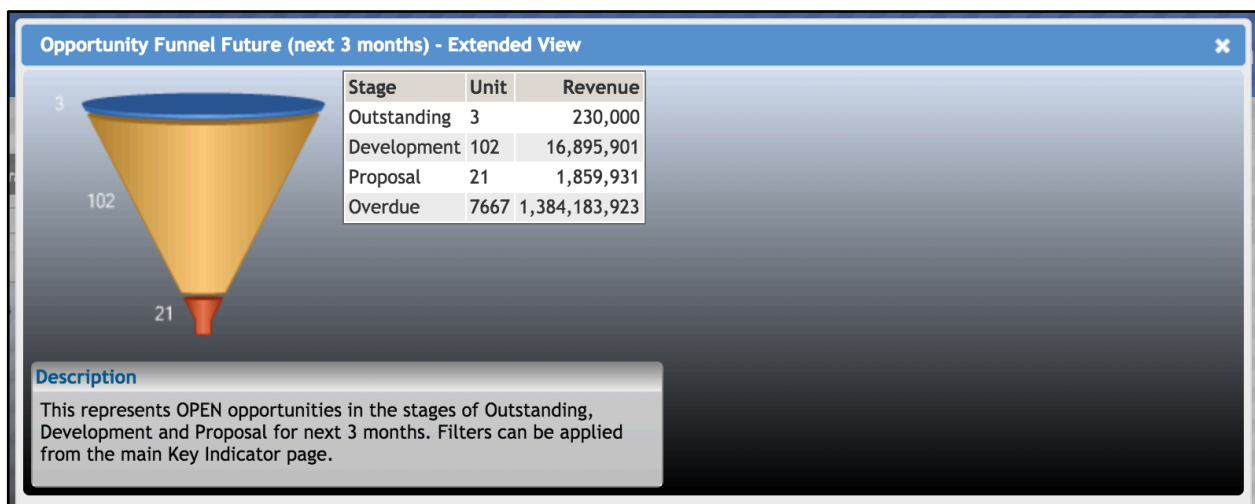
Add to My Favorites

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).

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.





The screenshot shows the 'Add New Activity' form in the SalesLink Executive interface. The form is titled 'Add New Activity' and includes the following fields and options:


- Customer:** Existing (selected), Temp Customer (not stored in account list), Not Customer Related
- Subject:** *
- Date/Time:** Mar 29, 2019, 3:00 PM - 4:00 PM, Show 15 min interval
- Type:** Telephone
- Main Purpose:** *
- Mileage:** *
- Important Notes or information:** *
- Checklist:** *
- Follow up Activity:** Yes (selected), No
- Subject:** *
- Date:** Mar 29, 2019, 3:00 PM - 4:00 PM, Show 15 min interval
- Mileage:** *
- Notes:** *
- Checklist:** *
- Attachments:** *
- Lead/Opportunity:** There is no outstanding Lead/Opportunity.
- Campaign:** *
- Issue:** There is no Issue

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

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

Type:

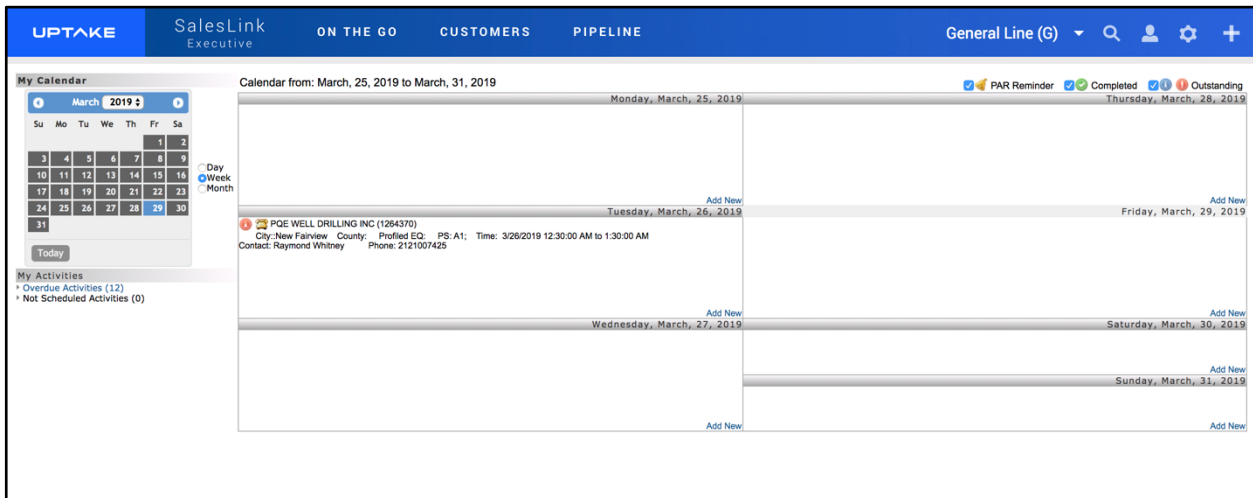
-  Email – suggest: attaching the email in the activity in the attachment section
-  Fax – suggest: indicating fax information in notes (i.e. subject, date, time, etc.)
-  Letter – if soft copy is available, suggest attaching it in the attachment section
-  Meeting – keep notes of what was discussed 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.



The screenshot shows the 'My Calendar' page in the SalesLink application. The top navigation bar includes 'UPTAKE SalesLink Executive', 'ON THE GO', 'CUSTOMERS', and 'PIPELINE'. The main content area displays a calendar for the week of March 25, 2019, to March 31, 2019. A smaller calendar on the left allows navigation between days, weeks, and months. The main calendar shows a grid with 'Add New' links for each day. A detailed activity entry for Tuesday, March 26, 2019, is visible, showing contact information for POE WELL DRILLING INC.

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.

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.

Region	Overdue Activities
Benton, Winston	22
Booth, Athena	49
Costello, Dick	39
Davila, Marion	12
Dilorio, Tim	46
Fowler, Charlie	1
Franco, Tawana	2764
Gomez, Thad	3737
Gutt, Erik	4503
Hunt, Laloya	1867
Hutchinson, Tawana	426
Miles, Theron	76
Padilla, Tawana	9269
Tyler, Josiah	1864
Watson, Kathy	1247

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.

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
dernouser1													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			6460
Guth, 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, Chrissy													0
Robertson, Joyce	2					3							5
Rocketman, 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
Total	4460	4496	4994	4485	4494	4236	4863	4406	834	4	1	1	44243

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.

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													
Dileo, 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.

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
					Not Profiled: N/A	Non-Cust (N): N/A	Unknown (U): N/A
					Not Profiled: N/A	Non-Cust (N): N/A	Unknown (U): N/A
							Total Assigned: 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, Altonia	0	0	0%
Costello, Dick	118	0	0%
Davila, Marion	0	0	0%
Dlorio, 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%
Hurt, Latoya	1569	523	33.33%
Hutchinson, Tawana	404	0	0%
Lo, 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)			

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.

Customer 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.	POPS%	OLGA Service Opport.	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	FWK 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				
8014238	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.

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.

Activity Purpose Report													
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.

My Activity History

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

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2018		3							2	2			7
2019			1										1

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.

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.

The screenshot displays the 'Add New Lead' form in the SalesLink Executive interface. The form is titled 'Lead Details' and is organized into several sections. At the top, there are navigation tabs: 'UPTAKE SalesLink Executive', 'ON THE GO', 'CUSTOMERS', and 'PIPELINE'. The current user is identified as 'General Line (G)'. The form fields are as follows:

- Urgent:** Radio buttons for 'Yes' and 'No'.
- Customer:** Radio buttons for 'Existing' and 'Temp Customer (not stored in account list)'.
- Assigned To:** A dropdown menu currently set to 'Unknown'.
- Division:** A dropdown menu currently set to 'General Line (G)'.
- Address:** Fields for 'State', 'City', and 'Postal Code'. 'Country' is set to 'US'.
- Phone:** A text input field.
- Contact:** A text input field.
- Description:** A text input field.
- Source:** A dropdown menu with a 'Select' button and a link to 'Additional Sources'.
- Est. Delivery:** A date and time input field.
- Est. Revenue:** A text input field.
- Stage:** A dropdown menu currently set to 'Lead'.
- Type:** Radio buttons for 'Sales', 'Rent', 'Parts', and 'Service'.
- Originated by:** 'demouser1 Demo'.
- Entered By:** 'demouser1 Demo on Monday, April 1, 2019 12:00:00 AM in Sales Link - Executive'.
- Note:** A large text area for additional information.
- Product:** A section with a message: 'Product cannot be selected when either 'Division' or 'Type' is not specified'.

A 'Save Lead' button is located at the bottom right of the form.

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.

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.

The screenshot displays the 'Lead Details' page for 'AZV WELL DRILLING INC (\$011649)'. The interface includes a top navigation bar with 'UPTAKE SalesLink Executive' and 'ON THE GO CUSTOMERS PIPELINE'. The page header shows 'General Line (G)' and 'Lead No 162452'. The 'Lead Details' section contains various input fields and dropdown menus for customer information, contact details, and lead management. At the bottom, there are tabs for 'Product details', 'Activities (0)', 'Attachments (0)', 'Notes (0)', 'Links (0)', and 'Team'. A 'Save Lead' button is located at the bottom right of the form.

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.

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 to 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.

- **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.

Assigned To	0 to 3 Days	4 to 7 Days	8 to 15 Days	15 + days	Total
UNASSIGNED,				238	238
.Delia				142,000	142,000
Joyce				1	1
Bass, Gavin				100	100
Bass, Gavin				4	4
Black, Aileen				1	1
Blackburn, Gloria				75	75
Blackburn, Gloria				8	8
Blackburn, Gloria				4	4
Blackwell, Josiah				29	29
Bradford, Cheryl				218,000	218,000
CLMonitor, cloudlinkmonitor				1	1
Cole, Erik				41	41
Compton, Winston				10,150	10,150
Cole, Erik				8	8
Compton, Winston				27,000	27,000
Davila, Irene				1	1
Dean, Julia				1	1
Demo, uptake2019				426,912	426,912
Durham, Harmony				3	3
English, Ruth				4,500	4,500
Evans, Carolina				14	14
Fowler, Charlie				22	22
Gaines, Johnny				2,000	2,000
Gambie, Gerald				1	1
				12	12
				1	1
				2,000	2,000
				15,000	15,000
				9	9

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.

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	45,422				45,422				
Baxter,Jill	244,524					244,524			
Blackburn,Gloria	464,212			120,000	260,500				83,712
Blackwell,Joshiah	129,528	19	13	74,500	1				5
CLMonitor,cloudlinkmonitor	1,500	19		1	1,000		1	500	55,028
Cole,Erik	420,541	55	30	395,600	1	4,710	3	2	17
Dean,Julia	31,627	1						1	18,679
Demo,demouser1	17,187	5				2,472		31,627	4
Demo,demouser2	279,002	1			1				14,715
English,Ruth	1				1				
Evans,Carolina	12								1
Franco,Tawana	10,000	8	7	8,000					2,000
Garrison,Nick	112,862	38	20	35,000		37,000	1		15
Gilmore,Terrance	4				1	3			40,662
Goodman,Bryon	294,501	20	16	294,001		1			3
Hanna,Simone	1							1	500
Harrison,Gavin	5,300	8				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.

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.

Product Type	12 Months back				12 Months Forward												Rolling 12 Month(s) Total	Beyond 12 Months	Unknown	Total	
	Won	Lost	No Deal	Total	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar					
Sales	18	46	13	77	22	9	6	4	1	1	2		5	4			54	31	5275	5360	
	3,683,626	6,434,125	1,591,578	11,709,330	7,228,375	1,850,390	1,588,700	2,106,587	470,000	134,732	440,803		1,602,942	181,813			15,604,342	1,713,489	999,219,395	1,016,537,228	
Rent											1				1		2			24	
															57			57		3,458,349	3,458,406
Parts	17,814	195	23,389	41,399													1			49	51
	547	24	206	777													20			335	359
Service	7,206,344	168,037	4,641,823	12,016,204	198,248		159,297	37,000									394,645	9,211	6,837,568	7,241,423	
	571	71	223	865	32	9	7	6	1	5	3	2	5	5	1		77	36	5681	5794	
All Products Types	10,907,784	6,602,357	6,256,791	23,766,932	7,426,622	1,850,390	1,747,997	2,143,587	470,000	134,732	440,803		1,602,942	181,870	100		15,999,044	1,724,700	1,009,917,830	1,027,641,574	

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.

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.

Region	2018												2019			Total
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar				
Benton, Winston								1						3	4	
								89,102						2	89,104	
Davila, Marion			1					3	9				1	4	18	
		12,590						126,422	1,989,339				147,720	4,597	2,280,668	
Fowler, Charlie				1				2	1					3	7	
				2,100				310,462	384,000					281,318	977,880	
Franco, Tawana	73	78	76	137	80	96	71	69	61	6	2		45	794		
	1,311,123	1,193,110	2,287,148	1,604,896	1,429,056	2,668,040	1,161,001	980,197	504,748	2,500	1,000		28,189	13,171,007		
Gomez, Thad	1	5	5	1			1	1	3				2	23		
	1,235	1,904,026	1,062,899	138,083		1,386	182,973	611,039		513,019			252,216	4,666,875		
Gutt, Erik	64	72	53	49	63	61	51	49				1		526		
	12,201,323	14,836,513	12,340,481	10,465,848	13,889,617	13,082,133	10,385,543	13,827,956	13,961,093					114,990,508		
Hutchinson, Tawana			1											1		

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.

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.

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		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			Invoice Revenue			
	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	50,776	4,667		2,493,865(20)	33,840(4)	1,998,573(142)	1,527	36,496	51,435	61	13		360	5,556,534		15	108,609					
Gutt, Erik	102	35	34	64	162	288	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.

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.

NOTE: Numbers include Accounts Receivable for all divisions and exclude unapplied cash.

Total Equipment Rental Service Parts Misc

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	1,017,176.80	144,924.27	3,807,210.01
Franco, Tawana	Nick Garrison		1,328,126.06	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 McDowell		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 Pans		2,232,821.61	615,716.47	322,838.08	257,227.32	3,428,603.48
Gutt, Erik	Athens Gregory		772,252.53	655,022.46	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	233,649.24	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		566,224.87	200,939.49		-427.16	766,737.20
Miles, Theron	Carin Rosales		35,186.38	11,466.18	5,591.15	1,204.30	53,468.01
Padilla, Tawana	Ruth McCormick		6,900.00			2,354.94	9,254.94
Padilla, Tawana	Rafael Payne		6,010.04	122,841.41	10,212.88	574.20	141,638.53
Watson, Kathy	Hugh McMahon		371,388.63	112,376.03	73,752.95	35,367.51	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		1,330,683.10	546,809.98	372,766.26	358,007.62	2,608,446.96
Watson, Kathy	Ruth English		1,167,899.10	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	Stephanie 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.

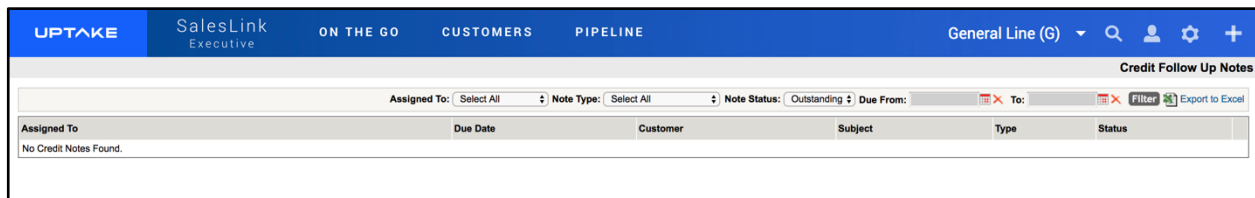
Filter what accounts receivable information is displayed by selecting or deselecting the category checkboxes at the top left of the page. The table will automatically update as each filter selection is made.

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.



Assigned To	Due Date	Customer	Subject	Type	Status
No Credit Notes Found.					

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.

UPTAKE		SalesLink Executive		ON THE GO	CUSTOMERS	PIPELINE	General Line (G)		🔍	👤	⚙️	+
My Requests												
New Requests 📄 Export												
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.

UPTAKE		SalesLink Executive		ON THE GO	CUSTOMERS	PIPELINE	General Line (G)		🔍	👤	⚙️	+
2019 Outstanding Account Update Requests												
Request Status: New Requests 📄 Export												
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		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.

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.

REGION	DIVISION	REP TYPE	Sales Team			
All	All	All	FILTER			
Last Name	First Name	Email	Mobile Phone	Office Phone	Home Phone	
Acosta	Rafael	pjxyqpt.ellqzaipt@cjqztyhlu...	2121005671			VIEW
Bartlett	Joyce	ctpesaj.rhzrba@ayuwafovgn...	2121130210			VIEW
Baxter	Jill	nfajjhk.xjgbhp@jkracs.x-m...	2121005671			VIEW
Black	Royce	jqzjivs.ckjbjaj@mqrsoqrq.nb...	2121005678			VIEW
Blackburn	Gloria	jyhjocys.msbgfkub@fhdhvd...				VIEW
Blackburn	Gloria	mziciag.ewhkiycg@hengnzc...				VIEW
Blackwell	Josiah	cvgvmaq.fzznlceej@wyvncx...	2121005801			VIEW
Bonilla	Lorrie	urvnpy.mopzkhuezp@ujyah...	2121005671			VIEW
Boyd	Brien	ggwvtcl.gghesylq@oekrbgzz.b...	2121011547			VIEW
Bradley	Barrett	wrcjzsr.jamuxt@hkyvfbzyz...	2121005677			VIEW
Branch	Jared	bawswgv.vlophzkm@ezprina...	2121011514			VIEW
Cole	Erik	jytjbusp.inihgqite@rpwqikne...	2121011711			VIEW
Crane	Tanya	twwathz.bkfwwarb@pbplbbst...	2121130389			VIEW

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.

Request History

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

Region	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Franco, Tawana	50												50
Gomez, Joy		2											2
Gomez, Thad	80												80
Gutt, Erik	3												3
Hunt, Latoya	2												2
Hutchinson, Tawana	2												2
Padilla, Tawana	65												65
Watson, Kathy	8	2		1									11
Total:	210	4	0	1	0	0	0	0	0	0	0	0	215

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.

RequestStatus: Hold Requests	Under 3 Days	4 to 7 Days	8 to 14 Days	15 to 30 Days	Over 31 Days	Total	Average
Branch Administrator						58	3038.4
Unassigned						58	3038.4

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.

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
pays	1	5/29/2018 3:49:50 AM	Demo_demouser2	
SIMA Workshop Registrations	33			
UCC	0			
UCC	651			
HR 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	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	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	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	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	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.

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.

By Branch		By County		Customer Accounts		
Branch	ST No	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.

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.

Issues

Add New Issue

To add a new issue:

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

The screenshot shows the SalesLink Executive interface with the 'Outstanding Issues - By Assigned To' table. The table has columns for 'Assigned To', '0 to 7 days', '8 to 15 Days', '16 to 30 days', '30+ days', and 'Total'. The data is as follows:

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
Cassandra 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:

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

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

Issue Details

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

Issue Details [Edit Issue](#)

Customer / Contact

Customer: PJV CONSTRUCTION INC (1042400) Division: G - General Line Branch: Branch00
 Address: 681 East Rocky Second Avenue Postal Code: 26595
 Country: US - United States State: IL - Illinois City: Weyauwega
 Contact: Adrienne Hendricks Phone:
 Fax: Email:

Details

Type: Invoice Priority: Medium Status: Open
 Source: Email Date Opened: Dec 12, 2018 Days Open: 110
 Root Cause: Incorrect - Just because Originator: demouser1 Demo Functional Area:
 Inv. No.: 123456 WO No.:
 Inv. Amount: 654321 Dispute Amount: 321
 Subject: Over charged
 Description: Charged for part when it should have been covered under warranty.
 Resolution: Entered By demouser1 Demo on Dec 12, 2018 in Sales Link - Executive
 Changed By demouser1 Demo on Dec 12, 2018 in Sales Link - Executive

Assignments [Reassign](#)

Assigned To	Assigned By	Date	Email
Ami Rosales	demouser1 Demo	Dec 12, 2018	
dazafr Demo	demouser1 Demo	Dec 12, 2018	

Notes [New](#)
No Data Available.

Activities [New](#)

S	T	Activity	Activity Date	Activity Owner	Customer Number	Customer Name	Contact	Subject	Notes	Opp.	Campaign	Att.	Enter on	Enter User
		645133	Apr 12, 2019	Smith,Chanel	1042400	PJV CONSTRUCTION INC		PJV CONSTRUCTION INC (1042400)	Test				Dec 12, 2018	Demo,demouser1

Total Activities: 1

Attachments [New](#)
No Data Available.

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.

Outstanding Issues Assigned to Me - By Type/Reason

Type/Reason

Priority: Low Medium High Urgent
 Source: Customer Survey Email In Person Phone Call eBusiness Portal CAT Survey Other Survey
 Originator: All

Division: All
 Branch: All
 Issue: Open

Opened From: Apr 01, 2014 To: Apr 01, 2019 [Filter](#) [Export](#)

Type/Reason	0 to 7 days	8 to 15 Days	16 to 30 days	30+ days	Total
There are no issues.					
Total:					

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

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.

Assigned To	0 to 7 days	8 to 15 Days	16 to 30 days	30+ days	Total
Unassigned				1	1
Ami Rosales				1	1
Arlene Leblanc				1	1
Aurelio Small				2	2
Chanel Smith				1	1
Coy Cantu				3	3
Lara Reed				1	1
Marie Middleton				1	1
Total:				11	11

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.

Plans

Territory Plans

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

Region	Sales Rep	Year	Annual Status	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Costello, Dick	Vito Gill	2019	In Progress by Rep				
Watson, Kathy	Gloria Blackburn	2018	Completed by Rep				
Watson, Kathy	Stephanie Huffman	2018	In Progress by Rep				
Gutt, Erik	Kathy Watson	2018	In Progress by Rep				
Padilla, Tawana	Harmony Durham	2018	In Progress by Rep	Completed by Rep		In Progress by Rep	
Franco, Tawana	Nick Garrison	2017	In Progress by Rep				

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.

Region	Sales Rep	Customer	DIV	Year	EQ Target	PS Target	Rent Target	Annual Status	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Watson, Kathy	Gloria Blackburn	AAD CONTRACTOR LTD (1124736)	G	2018				Completed by Rep	In Progress by Rep			
Watson, Kathy	Gloria Blackburn	ABD CONSTRUCTION INC (1373575)	G	2018				In Progress by Rep				
Watson, Kathy	Stephanie Huffman	TZB WELL DRILLING INC (1286675)	G	2018				In Progress by Rep				
Franco, Tawana	Stanley Nicholson	YYI EXCAVATING & UNDERGROUND (1570725)	G	2018				In Progress by Rep	In Progress by Rep			

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.

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.

Region	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Gutt, Erik	10												10
Mercer, Winston		1											1
Watson, Kathy	19												19
Total:	29	1											30

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.

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.

2019 Competitive Info By - All Regions (New Deliveries)											
<input checked="" type="checkbox"/> Lost Sale <input checked="" type="checkbox"/> No Deal <input checked="" type="checkbox"/> Won Reason: All Division: G New/Used: New Sale/Rent: All Region: All Regions 12 Months back 2019 Filter Export											
Equipment Type	AA	98	CA	JD	NN	VO	WK	WL	ZG	Other	Total
Backhoe/Industrial Loaders											
415											
416				1							1
420			4	2						3	9
430										1	1
450											
Total:			4	3						4	11
Telehandlers											
TH255											
TH406											
TH407											
TH514											
TL642											
TL843											
TL1055											
TL1255											
Total:											
Skid Steer Loaders											
226											
232											
236			1							1	2
242											
246			1								1
252											
262										1	1
272			1								1
Total:			3							2	5
Multi-Terrain Loader											
247											
257											
277											
287											
297											
Total:											
Compact Track Loader											
239											

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.

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.

2019 Competitive Info By - All Regions (All Deliveries)												
<input checked="" type="checkbox"/> Lost Sale <input checked="" type="checkbox"/> No Deal <input checked="" type="checkbox"/> Won Reason: All Division: G New/Used: All Sale/Rent: All Region: All Regions 12 Months back 2019 Filter Export												
Equipment Type	Model	AA	98	CA	JD	NN	VO	WK	WL	ZG	Other	Total
Backhoe/Industrial Loaders												
415												
416					1						1	2
420				4	2						3	9
430											1	1
450												
Total:				4	3						5	12
Telehandlers												
TH255		AA	98	CA	JD	NN	VO	WK	WL	ZG	Other	Total
TH406												
TH407												
TH514												
TL642												
TL943												
TL1055												
TL1255												
Total:												
Skid Steer Loaders												
226												
232												
236				1							1	2
242												
246				1								1
252												
262											1	1
272				1								1
Total:				3							2	5
Multi-Terrain Loader												
247		AA	98	CA	JD	NN	VO	WK	WL	ZG	Other	Total
257												
277												
287												
297												
Total:												
Compact Track Loader												
239		AA	98	CA	JD	NN	VO	WK	WL	ZG	Other	Total

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.

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.

Sales Rep	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
No Data Available.													
Total:	0	0	0	0	0	0	0	0	0	0	0	0	0

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.

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.

UPTAKE		SalesLink Executive		ON THE GO	CUSTOMERS	PIPELINE	General Line (G)		Current Campaigns		
Current Campaigns		Export									
Name	Description	Division(s)	Start Date	End Date	Owner	Created By	Created On	Total Accounts	Add		
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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 egetas 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	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 egetas 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		
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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.

Campaign Details

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

The screenshot displays the 'Campaign No 130 - Campaign Details' page. The top navigation bar includes 'UPTAKE SalesLink Executive', 'ON THE GO', 'CUSTOMERS', 'PIPELINE', and 'General Line (G)'. The page is divided into several sections:

- Campaign Details:** Includes fields for Campaign Name, Description, Targeted Market, Est. Revenue, Total Cost, Start Date (Feb 01, 2016), End Date (Sep 30, 2020), Owner, and Excluded from Opportunity/Lead. It also features checkboxes for Opportunity Types (Sales, Rent, Parts, Service) and Divisions (Agriculture, Engine, General Line, International, Perkins Engine, Rental, Truck).
- Campaign Effectiveness:** A summary box on the right showing metrics: Total Accounts (7), Lead (2), Outstanding (1), Development (1), Proposal (0), Won (0), and No Deal (0).
- Attachments:** A section with a 'New' button and the text 'No Data Available'.
- Target Accounts:** A table listing 7 target accounts with columns for Cust No, Cust Name, Address, Location, Last Activity, Opps, Leads, Source, and a 'Remove Selected' checkbox.

Cust No	Cust Name	Address	Location	Last Activity	Opps	Leads	Source	Remove Selected
1023150	UKT CONTRACTOR LTD	247 North Hague Avenue	Wilderville		1	-	Lead/Opportunity	<Not Removable>
1129595	GIE CONTRACTOR LTD	97 White Second St.	Weyauwega		-	-	Search Existing Customers	<Not Removable>
1129600	YUQ CONTRACTOR LTD	97 White Second St.	Weyauwega	May 08, 2016 Ruth Mc Cormick	-	-	Search Existing Customers	<Not Removable>
1222222	OCF EXCAVATING & UNDERGROUND	786 West Green Nobel Street	West College Corner	Feb 20, 2018 demouser1 Demo	-	-	Activity	<Not Removable>
1556632	BRG EXCAVATING & UNDERGROUND	66 South White Second Avenue	Weyauwega		-	1	Lead/Opportunity	<Not Removable>
1678795	SON EXCAVATING & UNDERGROUND	60 Rocky Second Freeway	Beckemeyer		-	-	Lead/Opportunity	<Not Removable>
1880875	BPL PAVING	438 North White Hague St.	Valley Cottage		-	1	Lead/Opportunity	<Not Removable>

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**.

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.

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.

OLGA Summary ()																						
PSSR	UC		Eng		GET		DT		Hyd		PM		Gen		Structural		Other		Parts		Service	
	Opportunity	POPS%	Opportunity	POPS%	Opportunity	POPS%	Opportunity	POPS%	Opportunity	POPS%	Opportunity	POPS%	Opportunity	POPS%	Opportunity	POPS%	Opportunity	POPS%	Opportunity	POPS%	Opportunity	POPS%
Company Avg	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

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.

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.

Customer		Equipment				Warranty				Opportunity								
Customer	Activity	Make	Model	Serial #	Current SMU	MSR	PSSR	Type	Description	D I Expire V Date	SMU	Selling Facility	Opp No	Stage	Type	Sales Rep	Est Revenue	
AGV WELL DRILLING INC (1211050)		AA	236D	0KRR26272	182 Hrs on Jun 21, 2016	Ruth English	Gavin Harrison	Standard	3Y/1000HR CCE PREM CLBR	G Mar 02, 2019	1,000 Hrs	Branch09						On Hold Declined Activity Opportunity
FWT WELL DRILLING INC (1588910)		AA	906M	0XND45538	0 Hrs on Dec 02, 2016	Hugh Mc Mahon		Standard	1YR STANDARD WCAT LABOR	G Mar 03, 2019	999,999 Hrs	Branch00						On Hold Declined Activity Opportunity
LBU CONTRACTOR LTD (1067590)		AA	D5K2	0TPM20718	1,226 Hrs on Apr 13, 2016	Terrance Gilmore	Gavin Harrison	Standard	3YR/5000HR PTIHYD CLBR 00	G Mar 03, 2019	5,000 Hrs	Branch00						On Hold Declined Activity Opportunity
YFK WELL DRILLING INC (1762396)		AA	262D	0BDO72225	363 Hrs on Dec 11, 2017	Shad Stevenson	Bryon Jensen	Standard	1YR STD CCE WCAT LABOR	G Mar 06, 2019	0 Hrs	Branch00						On Hold Declined Activity Opportunity
PNV EXCAVATING & UNDERGROUND (1706460)		AA	430F2 HRC	0UQR58265	282 Hrs on Dec 25, 2017	Athena Gregory	Gavin Harrison	Standard	1YR STANDARD WCAT LABOR	G Mar 08, 2019	999,999 Hrs	Branch00						On Hold Declined Activity Opportunity
UKT WELL DRILLING INC (1221400)		AA	305E2	0GIF72225	193 Hrs on Mar 01, 2017	Sonja Paul	Erik Cole	Standard	1YR STD CCE WCAT LABOR	G Mar 08, 2019	0 Hrs	Branch00						On Hold Declined Activity Opportunity
CLM MECHANICAL SERVICES INC (1861900)		AA	953C	0HKK45538	6,501 Hrs on Mar 10, 2016	Hugh Mc Mahon	Gavin Harrison	Standard	UIC ASSUR NEW PARTS(ALLN)	G Mar 10, 2019	10,000 Hrs							On Hold Declined Activity Opportunity
KSC MECHANICAL SERVICES INC (1871310)		AA	336E	0EJG93432	2,807 Hrs on Sep 28, 2016	Terrance Gilmore	Gavin Harrison	Standard	2YR/1000H USED PWT & HYD	G Mar 11, 2019	3,468 Hrs							On Hold Declined Activity Opportunity
MLG EXCAVATING & UNDERGROUND (1578840)		AA	305.5E2	0MAO26272	128 Hrs on Feb 22, 2014	Hugh Mc Mahon	Gavin Harrison	Standard	3YR/3KHR PT7HYD CCE CLBR	G Mar 12, 2019	3,000 Hrs							On Hold Declined Activity Opportunity
JUC CONTRACTOR LTD (1039720)		AA	242B3	0PPF72225	536 Hrs on Dec 22, 2014	Hugh Mc Mahon	Gavin Harrison	Standard	EXT P-H SEE MACH NOTES	G Mar 12, 2019	1,536 Hrs	Branch11						On Hold Declined Activity Opportunity
DFX MECHANICAL SERVICES INC (1758450)		AA	CB36B	0RW45538	0 Hrs on Dec 14, 2016	Hugh Mc Mahon	Gavin Harrison	Standard	1YR STANDARD WCAT LABOR	G Mar 13, 2019	999,999 Hrs							On Hold Declined Activity Opportunity
BUX CONTRACTOR LTD (1392700)		AA	972M	0ULS45538	2,557 Hrs on Dec 24, 2017	Athena Gregory	Gavin Harrison	Standard	1YR STANDARD WCAT LABOR	G Mar 13, 2019	999,999 Hrs							On Hold Declined Activity Opportunity
LZT EXCAVATING & UNDERGROUND (1532574)		AA	TL1255	0YVL45538	2,812 Hrs on Sep 19, 2017	Shad Stevenson	Bryon Jensen	Standard	60M CAT/JLG WLD SEETXT 00	G Mar 14, 2019	9,999 Hrs	Branch00						On Hold Declined Activity Opportunity
MJE CONTRACTOR LTD (G09R360)		AA	TL1055	0TPC58265	2,400 Hrs on Dec 21, 2017			Standard	60M CAT/JLG WLD SEETXT 00	G Mar 14, 2019	9,999 Hrs	Branch09						On Hold Declined Activity Opportunity
MJE CONTRACTOR LTD (G09R360)		AA	TL1255	0UNQ45538	2,188 Hrs on Dec 25, 2017			Standard	60M CAT/JLG WLD SEETXT 00	G Mar 15, 2019	9,999 Hrs	Branch09						On Hold Declined Activity Opportunity
JFK CONSTRUCTION INC (1462276)		AA	TL1055	0QGT58265	2,076 Hrs on Dec 25, 2017	Irene Davila	Stanley Nicholson	Standard	60M CAT/JLG WLD SEETXT 00	G Mar 15, 2019	9,999 Hrs	Branch00						On Hold Declined Activity Opportunity
UKT CONTRACTOR LTD (1023150)		AA	TL1055	0XKT72225	2,703 Hrs on Dec 24, 2017	Joyce Watson	Gavin Harrison	Standard	60M CAT/JLG WLD SEETXT 00	G Mar 15, 2019	9,999 Hrs							On Hold Declined Activity Opportunity
PJV CONSTRUCTION INC (1592460)		AA	TL1055	0ARX58265	2,214 Hrs on Aug 10, 2017	Theron Miles	Erik Cole	Standard	60M CAT/JLG WLD SEETXT 00	G Mar 15, 2019	9,999 Hrs							On Hold Declined Activity Opportunity

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]**.

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]**.

Sales

Sales Performance Summary

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

UPTAKE	SalesLink Executive	ON THE GO	CUSTOMERS	PIPELINE	General Line (G)	+	+														
										Performance Summary - MSR											
										Enabled Reps	Disabled Reps	2019	All Regions	Export							
MSR	N	U	Oth	ATT	YTD Equipment Sales	Unit	Volume	GP %	Lost Sale	Tr Sold	Online Parts %	Rep Expenses	Exp Total	ABC Cust.	Customer Mgmt.		AR Over 90 Days			Inventory	
															Activities	% Contacted	Equip.	Rental	Res		
Company Avg:	2	2	2	2	712,372		21.5	3			5.3			111			22,663	84,261	16		
Blackburn, Gloria														585							
Davila, Irene	1	1	1		355,290		64.6	2						98			42,206	119,484	3		
Demo, demouser2																		197,431	61		
Demo, mobiledemo																					
Demo, uptake2019				1																	
Durham, Harmony														246			3,701	35,652	8		
English, Ruth	3	2	1	3	521,160		17.5	13						135			4,961	110,094	28		
Gill, Vito																					
Gilmora, Terrance	1		1		167,500		7.2	2						50			(900)	3,308	10		
Graham, Kori										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				29,891	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			(963)		6		
Savage, Nyree																			2		
Shaffer, Cheryl	1				161,000		(13.9)							59			189,506	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.

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
demosuser2	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
Athens	Gregory	1.0		316,908		14,372		4.5				55,363		372,271		84	44	638			44
Jasper	Kearney													407		13	31				13
Nick	Long													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.

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.

UPTAKE	SalesLink Executive		ON THE GO	CUSTOMERS	PIPELINE	General Line (G)	🔍	👤	⚙️	+					
Performance Summary															
2019 Full Year All Regions All Divisions Export															
PSSR	YTD Parts and Service Sales								Online Parts %	OLGA		YTD Expenses	Customer Mgm.		
	Parts Direct	Parts Service	Parts Online	Total Parts	GP%	Labor	Misc	Total		Parts POPS%	Service POPS%		COMP	Exp Total	Assigned Cust.
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	1,622	-	9,614	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	648	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, Lorie	12,172	1,545	-	13,718	33.2	25,471	215,080	254,268	0.0	-	-	-	422	-	-
Cole, Erik	131,524	90,855	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	35,228	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	852	83,462	33.3	35,297	25,660	144,419	1.1	-	-	-	563	-	-
Herman, Mac	-	-	-	-	-	-	-	0	-	-	-	-	-	-	-
Hoffman, Nick	-	-	-	-	-	-	-	0	-	-	-	-	39	-	-
Holden, Chuck	-	-	-	-	-	-	-	0	-	-	-	-	-	-	-
Huffman, Stephenie	-	-	-	-	-	-	779	779	-	-	-	-	19	-	-
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, Darvi	-	-	-	-	-	-	-	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.

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.

SalesLink Executive														ON THE GO			CUSTOMERS			PIPELINE			General Line (G)			Parts & Service Sales Budget		
														Show: <input checked="" type="radio"/> Volume <input type="radio"/> GP%			2016			All Regions			Export					
PSSR	UC	Engine	GET	Drivetrain	CAT		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, Stephanie																												
Hutchinson, Eliaa																												
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													
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.

SalesLink Executive														ON THE GO			CUSTOMERS			PIPELINE			General Line (G)			Lost Sales By Region		
														Reason: All			New/Used: All			Year: 2019			Export					
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.

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.

2019 Lost Sales by Model - All Regions (All Deliveries)													
Reason:	Division:	New/Used:	Sale/Rent:	Region:									Export
All	G	All	All	All Regions	<input checked="" type="radio"/> 12 Months back	<input type="radio"/> 2019							
Backhoe/Industrial Loaders													
415		AA	98	CA	JD	NN	VO	WK	WL	ZG	Other	Total	
416											1	2	
420				4	2						2	8	
430											1	1	
450													
Total:				4	3						4	11	
Telehandlers													
TH255		AA	98	CA	JD	NN	VO	WK	WL	ZG	Other	Total	
TH406													
TH407													
TH514													
TL642													
TL943													
TL1055													
TL1255													
Total:													
Skid Steer Loaders													
226		AA	98	CA	JD	NN	VO	WK	WL	ZG	Other	Total	
232													
236				1							1	2	
242													
246				1								1	
252													
262											1	1	
272				1								1	
Total:				3							2	5	
Multi-Terrain Loader													
247		AA	98	CA	JD	NN	VO	WK	WL	ZG	Other	Total	
257													
277													
287													
297													
Total:													
Compact Track Loader													
239		AA	98	CA	JD	NN	VO	WK	WL	ZG	Other	Total	

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).

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.

Sales Rep	# Calls	Lost Sales	Revenue (Sales)				Lost (UCC)			
			Sales \$ New	U n i t	Sales \$ Used	U n i t	Total \$ Lost	U n i t	Total \$ New	U n i t
Miles, Theron	25	5	1,575,780	10	140,000	1	560	27,751		
Mc Mahon, Hugh	1,786	25	8,923,010	91	1,354,922	19	14,960	733,389		
Gregory, Athena	1,482	5	9,104,174	30	530,861	5	541,800	373,332		
Paul, Sonja	1,016	31	24,231,539	97	967,000	10	176,710	1,975,052		
Watson, Joyce	912	37	22,237,230	105	144,000	4	417,420	841,224		
Shaffer, Cheryl	1,025	6	13,421,049	66	651,500	10	103,725	114,841		
Nicholson, Nanette	89	5	681,000	2	1,492,798	26		41,587		
Long, Nick	14				41,000	1				
Stevenson, Alonzo	154	5	7,727,587	26			12,311			
Stevenson, Shad	1,155	33	5,510,560	43	640,264	9	20,695	281,649		
Davila, Irene	2,239	19	8,227,964	56	463,280	5	404,960	613,653		
English, Ruth	3,048	64	10,651,656	66	1,212,494	22	117,299	979,549		
Kennedy, Jasper			366,141	2	1,412,424	61				
Gilmore, Terrance	751	15	3,264,495	32	385,400	6	147,175	91,341		
Rosales, Carin	2				2,577,650	100				
Payne, Rafael							16,636			
Savage, Nyree	3		145,500	2						
Total	13,701	250	116,266,985	630	12,013,592	279	1,974,262	6,073,368		

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.

Latest Work Orders

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

The screenshot shows the 'Latest Work Orders' page in the SalesLink Executive interface. The page title is 'Latest Work Orders'. The status is 'Open' and the division is 'General Line'. The table displays work orders for various sales reps across different regions. The 'Open in' column shows the number of work orders for each time period: Last 3 days, Last 7 days, Last 30 days, Last 60 days, and Last 90 days.

Region	Sales Rep	Open in				
		Last 3 days	Last 7 days	Last 30 days	Last 60 days	Last 90 days
Benton, Winston	uptake2019 Demo					
	Vito Gill					
	demouser2 Demo					
	Julia Dean					
	Gavin Perry					
	Barrett Marsh					
	Luciana Watson					81
	Nick Garrison					81
	Josiah Blackwell					60
	Gavin Harrison					236
	Marcella Bartlett					
	Tamiko Kaiser					59
	Gavin Foglia					
	Erik Cole					105
Franco, Tawana	Elsa Hutchinson					
	Bryon Jensen					241
	Aileen Black					
	Daryl Mc Dowell					
	Gloria Blackburn					7
	Lesley Raymond					
	Elsa Travis					
	Alex Hatfield					40
	Bryon Goodman					32
	Stanley Nicholson					19
	Karl Pena					36
Gardner, Casandra	Aileen Villarreal					1
	Casandra Gardner					
Gomez, Joy	mobiledemo Demo					
	Kathy Watson					
	Athena Gregory					22
	Songja Paul					83
Gutt, Erik	Joyce Watson					62
	Cheryl Shaffer					47
	Nick Long					1

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.

CAT CSS

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

SalesLink Executive															
ON THE GO CUSTOMERS PIPELINE															
General Line (G)															
CAT CSS															
Outstanding Transactions Uploaded Transactions Not Applicable Transactions															
Status: <input type="checkbox"/> New <input type="checkbox"/> On Hold <input type="checkbox"/> Came from Not Applicable <input type="checkbox"/> Ready to Upload Division: All Divisions Transaction Type: All <input checked="" type="checkbox"/> Lost Sale <input checked="" type="checkbox"/> No Deal <input checked="" type="checkbox"/> Won Filter Total: 26															
>> Create New Batch Export															
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	Edit	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]	<input type="checkbox"/>
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]	<input type="checkbox"/>
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]	<input type="checkbox"/>
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]	<input type="checkbox"/>
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]	<input type="checkbox"/>
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]	<input type="checkbox"/>
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]	<input type="checkbox"/>
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]	<input type="checkbox"/>
Lost - Participated	160022	124481	G	1711340	DGL EXCAVATING & UNDERGROUND	Ruth English	Pennsylvania		BUILDING, RESIDENTIAL (240)	New 1-Sold	Private	Jan 19, 2019	New	[Edit]	<input type="checkbox"/>
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]	<input type="checkbox"/>
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]	<input type="checkbox"/>
Lost - Participated			G	1399555	ZJB WELL DRILLING INC	Hugh Mc Mahon	Pennsylvania		BUILDING, INDUSTRIAL (260)	New 1-Sold	Private	Jan 20, 2019	New	[Edit]	<input type="checkbox"/>
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]	<input type="checkbox"/>
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]	<input type="checkbox"/>
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]	<input type="checkbox"/>
Lost - Participated			G	1870985	GPH CONSTRUCTION INC	Aileen Shannon	Illinois		5TH WHEEL LOWBOY TRACTOR (625)	New 1-Sold	Private	Apr 07, 2018	New	[Edit]	<input type="checkbox"/>
Lost - Participated	143948		G	6013528	GIF MECHANICAL SERVICES INC	Aileen Shannon	Illinois		5TH WHEEL LOWBOY TRACTOR (615)	New 1-Sold	Private	Aug 07, 2018	Ready to Upload	[Edit]	<input type="checkbox"/>
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]	<input type="checkbox"/>
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]	<input type="checkbox"/>

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.

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.

Sales Manager	Equipment Sale		Rental		Parts and Service		Manual		Needing Mgr Approval	Approved (On Hold)	Ready for Payroll
	Report Generated	On Hold by Admin	Report Generated	On Hold by Admin	Report Generated	On Hold by Admin	Not Ready for Approval	On Hold for Review			
Benton, Winston											
Costello, Dick											
Fowler, Charlie											
Franco, Tawana											17
Gutt, Erik			50						1		
Miles, Theron											
Padilla, Tawana											
Watson, Kathy			48								
Unknown											
Total:			98						1		17

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.

Sales Manager	Net Paid	Equipment Sale	Rental	Parts and Service	Manual	Total Earned	Base Salary	Guarantee Paid	Balance Owed	Balance Remaining YTD
Benton, Winston										
Costello, Dick										
Fowler, Charlie										
Franco, Tawana										
Gutt, Erik										
Miles, Theron										
Padilla, Tawana										
Unknown										
Watson, Kathy										
Total:	0.00							0.00		

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.

Admin – Commissions Period

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

Commission Period	Start Date	End Date	Update User	Update Date	Closed User	Closed Date	
1	2019-01-01	Jan 31, 2019	Everett579	2011-01-01			Update
2	2019-02-01	Feb 28, 2019	Everett579	2011-01-01			Update
3	2019-03-01	Mar 31, 2019	Everett579	2011-01-01			Update
4	2019-04-01	Apr 30, 2019	Everett579	2011-01-01			Update
5	2019-05-01	May 31, 2019	Everett579	2011-01-01			Update
6	2019-06-01	Jun 30, 2019	Everett579	2011-01-01			Update
7	2019-07-01	Jul 31, 2019	Everett579	2011-01-01			Update
8	2019-08-01	Aug 31, 2019	Everett579	2011-01-01			Update
9	2019-09-01	Sep 30, 2019	Everett579	2011-01-01			Update
10	2019-10-01	Oct 31, 2019	Everett579	2011-01-01			Update
11	2019-11-01	Nov 30, 2019	Everett579	2011-01-01			Update
12	2019-12-01	Dec 31, 2019	Everett579	2011-01-01			Update

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.

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	Type	
Blackburn	Gloria	Watson, Kathy		Active	G 1 mkt	Edit
Burgess	Desmond	Reed, Christy		Disabled	G 1 130	Edit
Davia	Irene	Watson, Kathy		Active	G 1 90	Edit
Demo	demouser2	Fowler, Charlie		Active	G 1 1	Edit
Demo	mobledemo	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	Cassandra	Gardner, Cassandra		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	Athens	Guti, Erik		Active	G 1 31	Edit
Kennedy	Jasper	Miles, Theron		Active	G 1 04	Edit
Long	Nick	Guti, 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	Guti, 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]**.

Admin – User Access

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

Executives			Regions													
Last Name	First Name	Admin	Gutt, Erik	Costello, Dick	Reed, Christy	Miles, Theron	Gomez, Joy	Sexton, Jim	Gardner, Casandra	Fowler, Charlie	Franco, Tawana	Padilla, Tawana	Watson, Kathy	Benton, Winston	Add	Delete S
De Leon	Tarik	<input checked="" type="checkbox"/>													<input type="checkbox"/>	Edit Delete
Demo	banasa	<input type="checkbox"/>													<input type="checkbox"/>	Edit Delete
Demo	demouser1	<input checked="" type="checkbox"/>													<input type="checkbox"/>	Edit Delete
Demo	demouser2	<input checked="" type="checkbox"/>													<input type="checkbox"/>	Edit Delete
Demo	kolarj	<input checked="" type="checkbox"/>													<input type="checkbox"/>	Edit Delete
Demo	novakz	<input type="checkbox"/>													<input type="checkbox"/>	Edit Delete
Demo	obidor	<input type="checkbox"/>													<input type="checkbox"/>	Edit Delete
Demo	ojey	<input type="checkbox"/>													<input type="checkbox"/>	Edit Delete
Demo	wiseda	<input type="checkbox"/>													<input type="checkbox"/>	Edit Delete
Franco	Tawana	<input type="checkbox"/>	Read	Read	Read	Read		Read	Read		Admin	Read	Read		Edit Delete	
Hanna	Simone	<input checked="" type="checkbox"/>													<input type="checkbox"/>	Edit Delete
Le	Israel	<input type="checkbox"/>									Read				<input type="checkbox"/>	Edit Delete
Marshall	Jared	<input checked="" type="checkbox"/>													<input type="checkbox"/>	Edit Delete
Middleton	Marie	<input checked="" type="checkbox"/>													<input type="checkbox"/>	Edit Delete
Mullen	Clay	<input checked="" type="checkbox"/>													<input type="checkbox"/>	Edit Delete
Novak	Julissa	<input type="checkbox"/>	Admin									Admin	Admin		Edit Delete	
Padilla	Tawana	<input type="checkbox"/>										Read		<input type="checkbox"/>	Edit Delete	
Reed	Lara	<input type="checkbox"/>									Admin			<input type="checkbox"/>	Edit Delete	
Santana	Leigh	<input checked="" type="checkbox"/>													<input type="checkbox"/>	Edit Delete
Snyder	Mikel	<input type="checkbox"/>													<input type="checkbox"/>	Edit Delete
Total: 20 user(s)													Admin	<input type="checkbox"/>	Edit Delete	

None No Access
 Write Read / Write
 Read Read only
 Admin Read / Write / Submit to payroll

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.

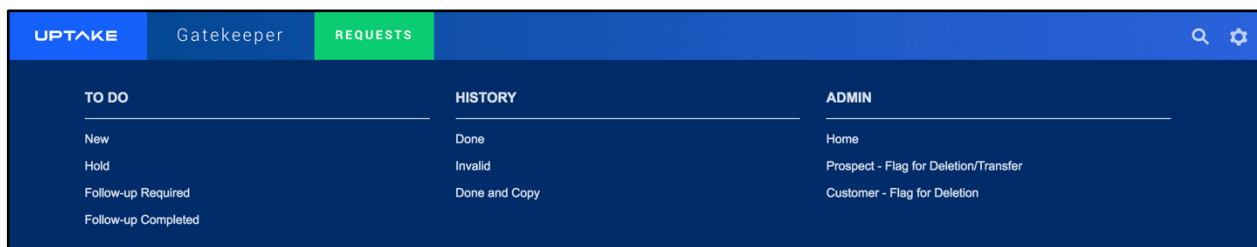
GATEKEEPER

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.

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.

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.

UPTAKE		Gatekeeper		REQUESTS		Latest New Requests	
My/Unassigned Requests Filter							
Executive Requests (New and Follow-up Completed)							
Date Submitted	Request Type	Customer#	Customer	Requested By	Assigned To		
Jan 18, 2019 3:13:07 PM	Add Job Site	1497746	MRI CONSTRUCTION INC	Thad Gomez	Royce Black	View Request	
Mar 07, 2019 10:51:01 AM	Sales Rep Assign	1690101	BPE EXCAVATING & UNDERGROUND	uptake2019 Demo	Royce Black	View Request	
Feb 21, 2019 12:15:28 PM	Division Update	1023150	UKT CONTRACTOR LTD	demouser1 Demo	Royce Black	View Request	
Jan 22, 2019 9:02:34 AM	Sales Rep Assign	1563050	OKS EXCAVATING & UNDERGROUND	Thad Gomez	Royce Black	View Request	
Jan 19, 2019 12:12:25 PM	Influencer - Extra Detail Add	1236760	FRX WELL DRILLING INC	Milton Anderson		View Request	
Jan 18, 2019 3:12:02 PM	Sales Rep Assign	1703050	TNE EXCAVATING & UNDERGROUND	Thad Gomez		View Request	
Jan 18, 2019 11:36:00 AM	Influencer - Extra Detail Add	1000207	YPN CONTRACTOR LTD	Milton Anderson		View Request	
Jan 18, 2019 10:38:53 AM	Sales Rep Assign	1287668	VVT CONSTRUCTION INC	Thad Gomez		View Request	
Jan 08, 2019 10:59:12 AM	Influencer - Extra Detail Add	1401950	IJZ CONSTRUCTION INC	Milton Anderson		View Request	
Jan 06, 2019 4:44:30 PM	Influencer - Extra Detail Add	1079150	JFV CONTRACTOR LTD	Milton Anderson		View Request	
Jan 06, 2019 4:44:30 PM	Influencer Add	1079150	JFV CONTRACTOR LTD	Milton Anderson		View Request	
Jan 04, 2019 8:12:32 AM	Sales Rep Assign	1879252	ESH PAVING	Thad Gomez		View Request	
Jan 04, 2019 8:06:31 AM	Sales Rep Assign	1649275	WGW EXCAVATING & UNDERGROUND	Thad Gomez	Royce Black	View Request	
Jan 04, 2019 7:57:01 AM	Sales Rep Assign	1791046	IFE MECHANICAL SERVICES INC	Thad Gomez		View Request	
Nov 13, 2018 4:31:49 PM	Name/Address Update	1515715	LGH CONSTRUCTION INC	Milton Anderson		View Request	
Nov 21, 2017 2:52:18 PM	Influencer - Extra Detail Add	1656554	VSY EXCAVATING & UNDERGROUND	Thad Gomez		View Request	
Nov 21, 2017 2:52:18 PM	Influencer Add	1656554	VSY EXCAVATING & UNDERGROUND	Thad Gomez		View Request	
Oct 23, 2017 4:39:30 PM	Influencer - Extra Detail Add	1797960	GTI MECHANICAL SERVICES INC	Thad Gomez		View Request	
Oct 23, 2017 4:39:30 PM	Influencer Add	1797960	GTI MECHANICAL SERVICES INC	Thad Gomez		View Request	
Oct 23, 2017 4:33:13 PM	Influencer Add	1222394	ICA WELL DRILLING INC	Thad Gomez		View Request	
Oct 23, 2017 4:30:01 PM	Influencer Add	1818815	AAK MECHANICAL SERVICES INC	Thad Gomez		View Request	
Oct 23, 2017 3:44:00 PM	Influencer - Extra Detail Add	1171250	BFY CONTRACTOR LTD	Thad Gomez		View Request	
Oct 21, 2017 10:33:40 AM	Influencer Add	1545455	RTX CONTRACTOR LTD	Thad Gomez		View Request	
Oct 21, 2017 10:20:10 AM	Physical Location Update	1545455	RTX CONTRACTOR LTD	Thad Gomez		View Request	
Jun 18, 2012 3:04:34 PM	Influencer Add	1651100	UUB EXCAVATING & UNDERGROUND	Coy Cantu		View Request	
Jun 06, 2012 3:56:56 PM	Influencer Add	1000152	ODP CONSTRUCTION INC	Tawana Hutchinson		View Request	
Nov 28, 2010 7:07:56 AM	Influencer Add	1597750	RQV EXCAVATING & UNDERGROUND	Coy Cantu		View Request	
Nov 20, 2010 3:08:47 PM	Influencer Add	1015960	DJK CONTRACTOR LTD	Coy Cantu		View Request	
Oct 21, 2010 12:20:42 PM	Influencer Add	1597750	RQV EXCAVATING & UNDERGROUND	Coy Cantu		View Request	
Aug 22, 2010 8:05:07 AM	Influencer Add	1734775	FOB MECHANICAL SERVICES INC	Coy Cantu		View Request	
May 16, 2009 11:52:41 AM	Sales Rep De-Assign	1510660	LKO MECHANICAL SERVICES INC	Mac Terrell		View Request	
May 16, 2009 11:52:41 AM	Sales Rep Assign	1510660	LKO MECHANICAL SERVICES INC	Mac Terrell		View Request	
Apr 03, 2009 10:28:44 AM	Sales Rep Assign	1853954		Racheal Clark		View Request	
Apr 03, 2009 10:28:44 AM	Sales Rep Assign	1853954		Racheal Clark		View Request	
Mar 12, 2009 10:56:16 AM	Sales Rep Assign	1538296	POK CONTRACTOR LTD	Racheal Clark		View Request	
Sep 21, 2008 10:18:22 AM	Sales Rep Assign	1731125	RAW CONTRACTOR LTD	Racheal Clark		View Request	
Jun 09, 2008 7:57:28 AM	Customer De-assign	1806250	UGD MECHANICAL SERVICES INC	Simone Hanna		View Request	
Mar 01, 2008 9:35:06 AM	Physical Location Update	1019550	TWJ CONTRACTOR LTD	Racheal Clark		View Request	

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.

- 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.

UPTAKE		Gatekeeper		REQUESTS		Prospect - Flag for Deletion/Transfer		
Prospect - Flagged for Deletion								
Customer No	Customer Name	Action	Reason	Flagged	Delete Req	Delete Cust	Transfer	
\$001934	DEZ EXCAVATING & UNDERGROUND	Delete	Lorem ipsum dolor sit	Tracey893, 11/17/2017 5:22:49 PM				
Total 1								
Prospect - Flagged for Transfer								
Customer No	Customer Name	Action	Reason	Flagged	Delete Req	Delete Cust	Transfer	
\$017208	LWI CONSTRUCTION INC	Transfer	Lorem i	Karl066, 12/20/2017 4:50:40 PM				
\$009755	DWM WELL DRILLING INC	Transfer	Lorem i	Karl066, 12/15/2017 4:12:18 PM	Delete Req	Delete Cust	Transfer	
\$009075	DWM WELL DRILLING INC	Transfer	Lorem i	Karl066, 12/15/2017 4:11:41 PM	Delete Req	Delete Cust	Transfer	
\$014238	GDP WELL DRILLING INC	Transfer	Lorem i	Karl066, 12/8/2017 4:23:13 PM	Delete Req	Delete Cust	Transfer	
\$014409	VPK CONTRACTOR LTD	Transfer	Lorem i	Alexander283, 12/8/2017 9:34:35 AM	Delete Req	Delete Cust	Transfer	
\$014272	HNU CONTRACTOR LTD	Transfer	Lorem i	Karl066, 11/30/2017 4:17:50 PM	Delete Req	Delete Cust	Transfer	
\$011613	HNU CONTRACTOR LTD	Transfer	Lorem i	Karl066, 11/30/2017 4:17:19 PM	Delete Req	Delete Cust	Transfer	
\$017023	NRP EXCAVATING & UNDERGROUND	Transfer	Lorem ipsum dolor sit amet, con	Karl066, 11/27/2017 9:27:29 AM	Delete Req	Delete Cust	Transfer	
Total 8								
PROSPECTS TO BE TRANSFERRED OVERNIGHT								
Customer No	Customer Name	Reason	Flagged	DBS Customer No	Delete Req	Delete Cust	Transfer	
\$015648	LJH WELL DRILLING INC	Lorem ipsum do	Tina584, 4/13/2017 5:07:44 PM	1207930	Delete Req	Delete Cust	Transfer	
\$014268	AVW MECHANICAL SERVICES INC	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc tr	Karl066, 10/31/2016 10:55:43 AM	1736912	Delete Req	Delete Cust	Transfer	
\$002098	QRQ WELL DRILLING INC	Lorem i	Jennifer238, 7/20/2015 10:23:31 AM	1236545	Delete Req	Delete Cust	Transfer	
\$009178	FGX CONTRACTOR LTD	Lorem ipsum dolor sit amet, conseq	Karl066, 11/17/2014 11:25:14 AM	1152519	Delete Req	Delete Cust	Transfer	
\$003843	LMG CONTRACTOR LTD	Lorem ip	Anna305, 6/6/2014 2:18:51 PM	1136650	Delete Req	Delete Cust	Transfer	
\$002605	FVY EXCAVATING & UNDERGROUND	Lorem ip	Anna305, 6/6/2014 2:05:11 PM	1670958	Delete Req	Delete Cust	Transfer	
\$006885	JCN WELL DRILLING INC	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 y	Karl066, 4/29/2014 12:26:22 PM	1257966	Delete Req	Delete Cust	Transfer	
\$000971	WWH CONTRACTOR LTD	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 y	Marcia64, 1/11/2013 10:11:08 AM	1124059	Delete Req	Delete Cust	Transfer	
\$006768	JLC MECHANICAL SERVICES INC	L	Brenda079, 1/9/2013 12:02:22 PM	1821356	Delete Req	Delete Cust	Transfer	
\$000977	JFY WELL DRILLING INC	Lorem ipsum dolor sit amet, consectetur	Marcia64, 1/3/2013	1834579	Delete Req	Delete Cust	Transfer	

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

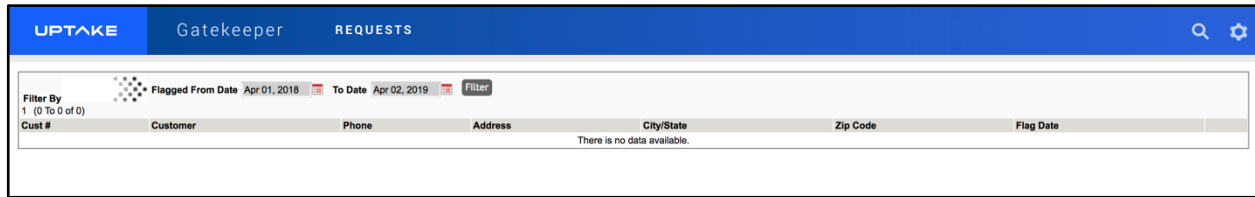
- Click **[Delete Req]** to delete the request.
- Click **[Delete Cust]** to delete the customer.
- Click **[Transfer]** to transfer the prospect customer to a DBS customer.

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.

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.



Cust #	Customer	Phone	Address	City/State	Zip Code	Flag Date
There is no data available.						

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]**.

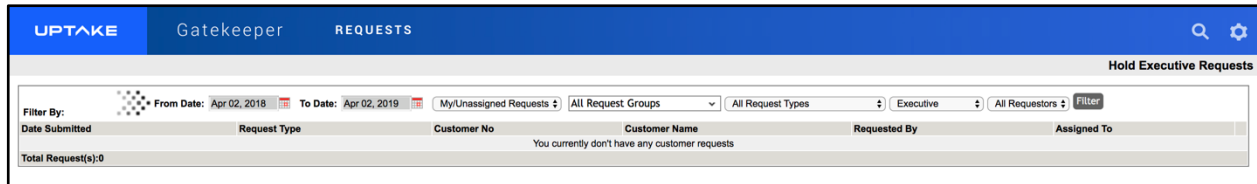
View Request:

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.

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:

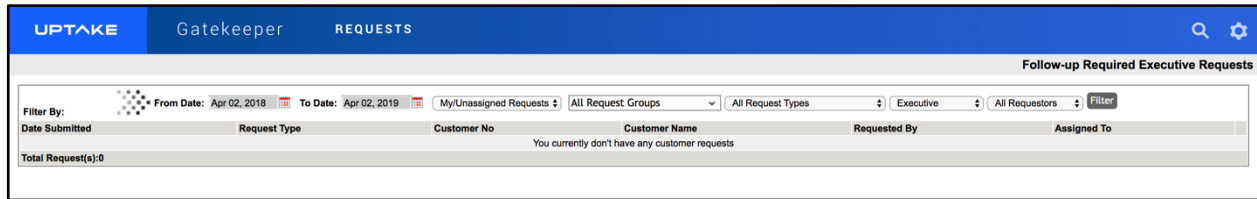
1. Select a date range using the calendar filters at the top of the page.
2. Select fields to filter by using the drop-down menus at the top of the page.
3. Click **[Filter]**.

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.

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:

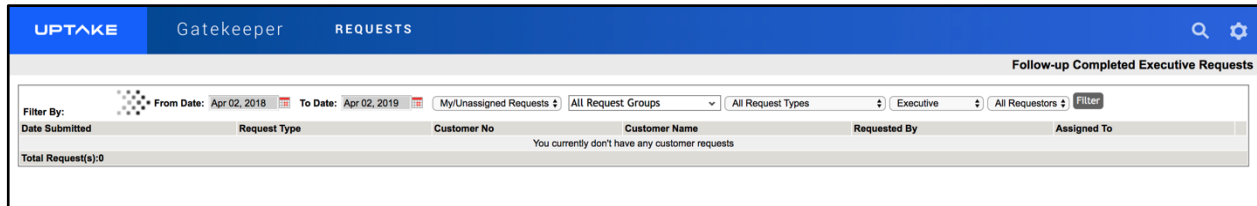
1. Select a date range using the calendar filters at the top of the page.
2. Select fields to filter by using the drop-down menus at the top of the page.
3. Click **[Filter]**.

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.

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.

History

Done

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

UPTAKE		Gatekeeper		REQUESTS			
Done Executive Requests							
Filter By:	From Date: Apr 02, 2018	To Date: Apr 02, 2019	My/Unassigned Requests	All Request Groups	All Request Types	Executive	All Requestors
Date Submitted	Request Type	Customer No	Customer Name	Requested By	Assigned To		
Mar 25, 2019 4:41:54 PM	Influencer Update	1387650	KEI CONSTRUCTION INC.	demouser1 Demo	Royce Black		View Request
Feb 04, 2019 8:13:46 PM	Influencer - Extra Detail Add	1365350	GZB MECHANICAL SERVICES INC	psearle Demo	Royce Black		View Request
Dec 08, 2017 2:47:24 PM	Influencer Delete	1337300	HANSON AGGREGATES PENNA, INC.	Al Andrews			View Request
Dec 08, 2017 2:47:04 PM	Influencer Delete	1337300	HANSON AGGREGATES PENNA, INC.	Al Andrews			View Request
Dec 08, 2017 2:46:36 PM	Influencer Delete	1337300	HANSON AGGREGATES PENNA, INC.	Al Andrews			View Request
Dec 08, 2017 2:46:05 PM	Influencer Add	1335750	HANSON AGGREGATES PA, INC.	Al Andrews			View Request
Dec 08, 2017 2:46:05 PM	Influencer - Extra Detail Add	1335750	HANSON AGGREGATES PA, INC.	Al Andrews			View Request
Dec 08, 2017 2:42:28 PM	Influencer Delete	1335750	HANSON AGGREGATES PA, INC.	Al Andrews			View Request
Dec 08, 2017 2:42:07 PM	Influencer Delete	1335750	HANSON AGGREGATES PA, INC.	Al Andrews			View Request
Dec 08, 2017 2:41:48 PM	Influencer Delete	1335750	HANSON AGGREGATES PA, INC.	Al Andrews			View Request
Dec 08, 2017 2:41:26 PM	Influencer Delete	1335750	HANSON AGGREGATES PA, INC.	Al Andrews			View Request
Dec 08, 2017 2:41:10 PM	Influencer Delete	1335750	HANSON AGGREGATES PA, INC.	Al Andrews			View Request
Dec 08, 2017 2:40:40 PM	Influencer Delete	1335750	HANSON AGGREGATES PA, INC.	Al Andrews			View Request
Dec 08, 2017 2:40:25 PM	Influencer Delete	1335750	HANSON AGGREGATES PA, INC.	Al Andrews			View Request
Dec 08, 2017 2:39:58 PM	Influencer Delete	1335750	HANSON AGGREGATES PA, INC.	Al Andrews			View Request
Dec 04, 2017 8:37:33 AM	Influencer Add	1649275	PIER RENAISSANCE, LP	Vincent Root			View Request
Dec 04, 2017 8:37:33 AM	Influencer - Extra Detail Add	1649275	PIER RENAISSANCE, LP	Vincent Root			View Request
Nov 30, 2017 4:11:22 PM	Influencer Update	1327050	PETER D FURNESS ELEC CO INC	Kyle Kohler			View Request
Nov 30, 2017 4:11:22 PM	Influencer - Extra Detail Add	1327050	PETER D FURNESS ELEC CO INC	Kyle Kohler			View Request
Nov 30, 2017 3:39:45 PM	Influencer - Extra Detail Add	1140000	CALVI ELECTRIC COMPANY	Kyle Kohler			View Request
Nov 29, 2017 4:42:16 PM	Influencer Add	1411355	HSC BUILDERS + CONSTR. MGRS	Mark Tad			View Request
Nov 29, 2017 4:42:16 PM	Influencer - Extra Detail Add	1411355	HSC BUILDERS + CONSTR. MGRS	Mark Tad			View Request
Nov 29, 2017 4:40:47 PM	Division Update	1411355	HSC BUILDERS + CONSTR. MGRS	Mark Tad			View Request
Nov 29, 2017 4:39:22 PM	Customer - Assign "" Rep	1411355	HSC BUILDERS + CONSTR. MGRS	Mark Tad			View Request
Nov 29, 2017 8:34:13 AM	Influencer Update	1279755	ELECTRI-TECH, INC	Kyle Kohler			View Request
Nov 29, 2017 8:32:15 AM	Influencer - Extra Detail Add	1279755	ELECTRI-TECH, INC	Kyle Kohler			View Request
Nov 29, 2017 8:28:37 AM	Customer - Assign "" Rep	1020750	WASTE MANAGEMENT INC	Mark Helsen			View Request
Nov 28, 2017 11:44:46 AM	Influencer Delete	1012901	A. F. DAMON, INC.	Patrick Kerns			View Request
Nov 21, 2017 5:07:40 PM	Influencer Add	1605850	OCEAN COUNTY VEHICLE MAINT	John Cerkenik			View Request
Nov 21, 2017 12:33:25 PM	Influencer Add	1000207	BILL GILLESPIE ELECTRIC INC.	Kyle Kohler			View Request
Nov 21, 2017 12:33:25 PM	Influencer - Extra Detail Add	1000207	BILL GILLESPIE ELECTRIC INC.	Kyle Kohler			View Request
Nov 17, 2017 4:39:07 PM	Influencer Add	1739393	SHERWOOD CONSTRUCTION CO.	Joe Villa			View Request
Nov 16, 2017 4:03:08 PM	Influencer Add	1279755	ELECTRI-TECH, INC	Kyle Kohler			View Request
Nov 16, 2017 4:03:08 PM	Influencer - Extra Detail Add	1279755	ELECTRI-TECH, INC	Kyle Kohler			View Request
Nov 15, 2017 2:15:20 PM	Influencer - Extra Detail Add	1667725	PROGRESSIVE SERVICES, INC.	Kyle Kohler			View Request

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.

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	1033265	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	1096160	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 Kraelich (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.

Done and Copy

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

Date Submitted	Request Type	Customer No	Customer Name	Requested By	Assigned To	
Dec 21, 2017 1:20:23 PM	Customer - Assign Rep	1287658	JONES LANG LASALLE	Glenn Bouthillette	Royce Black	View Request
Dec 18, 2017 3:13:06 PM	Customer - Assign Rep	1497746	LEVEL III	Glenn Bouthillette	Royce Black	View Request
Total Request(s):2						

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.