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 two triangles meeting at a central point.

Sales Operations
iMacs

USER GUIDE
Updated June 24, 2019

UPTAKE

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DISCLAIMER

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 This user guide will be updated on an ongoing basis and may have slightly outdated content due to the frequency of software updates.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

OVERVIEW

Summary

iMacs

iMacs stands for Intranet Material Acquisition Control System. Its main purpose is to help manage projects and track material purchases.

Projects

Projects contain one or more stock numbers.

Stock Number

Each stock number belongs to a project and has its own set of classes.

Classes

There are seven classes that belong to a stock number.

- CAT Consist - CAT engine order

- CAT Parts - parts ordered from Parts Department

- Equipment - parts ordered from outside suppliers

- Engineering - Engineering department requirements

- Production - Production Shop requirements

- Field Services - Field Service requirements

- External Services - services to be done by outside suppliers

- [-] Project: 151080
 - Project Information**
 - Customer Contacts
 - Project Team
 - Drawings/Manuals
 - Summary
 - CAT Consist
 - CAT Parts
 - Equipment
 - Engineering
 - Production
 - Field Service
 - External Services
 - New PCR
 - New Stock #
- [-] Stock: M1576012
 - Stock # Information**
 - Project Team
 - Summary
 - CAT Consist
 - CAT Parts
 - Equipment
 - Engineering
 - Production
 - Field Service
 - External Services

Navigation

Global Menu

The “Global Menu” includes global functions, reports, admin functions, and help. The Global menu is always located at the top of the screen, so you can access it from any page.

The screenshot shows the top navigation bar of the UPTAKE iMACS system. The main menu includes tabs for Quote Log, Project, Functions, Reports, Local Reports, Admin, and Links. A dropdown menu is currently open under the 'Project' tab, listing various project-related options: New Project, Projects Dashboard, All Projects, Pending Projects, In Progress Projects, Complete Projects, On Hold Projects, and Cancelled Projects. Below the navigation bar, there are search fields. One is labeled 'QUOTE SEARCH' and another is for a general search with a 'Search' button. At the bottom, a table header is visible with columns for 'iMACS Quote No', 'Date', and 'Project Name'.

Quick Find Bar

The "Quick Find" Bar helps you locate projects by project number, stock number, customer name, or engine serial number by selecting the type of search: "contains", "starts with" or "equals", then entering a keyword and clicking the Save button. The Quick Find Bar is always located in the same place - just below the global menu - so you can access it from any page. From the result page you can "drill-down" into the project details.

UPTAKE iMACS

Quote Log Project Functions Reports Local Reports Admin Links

Look for Project Name that contains Search

Left Menu

The "Left Menu" is available when you are in a project. The current left menu item is highlighted in white.

At the top of the left menu is the current project number, and the project name appears in the top right corner of the screen. Under the project number is the project summary information, which includes the class summaries for all stock numbers in this project.

UPTAKE iMACS demouser1 Demo

Quote Log Project Functions Reports Local Reports Admin Links

Look For Project Name that contains Search

Project: 190159 Project No: 190159 Project Name: Test for automation with stock Stock No:

Project Information

Project Information Customer Information Project Files Project Schedule Activities Outstanding Activities Completed

Project Information Edit Delete

Project No	190159		
Project Name	Test for automation with stock		
Owner	Uptake Demo		
Status	Pending		
Hold For Approval	NO		
Project Ready For Management Review			
Retainage			
Customer PO #			
Customer	1465994-AAD CONSTRUCTION INC		
Main Sales Rep	Aileen Shannon		
Job Site			
Comments			
Workflow Status			
Ready For Handoff	NO	Ready For Washout	NO
Payment Information			
Billing Currency	USD	TAX1 Exempt #	
Deposit Before Delivery	No	TAX2 Exempt #	

Under the project summary information, all stock numbers are listed. To work with a specific stock number, click on the stock number and the left menu will expand to show the stock summary information, including classes.

The screenshot shows the iMACS interface for a user named 'demouser1 Demo'. The top navigation bar includes 'Quote Log', 'Project', 'Functions', 'Reports', 'Local Reports', 'Admin', and 'Links'. Below the navigation bar is a search bar with the text 'Look For Project Name' and a dropdown menu set to 'that' with a 'contains' filter. The main content area is titled 'Stock Info' and displays details for Project No: 190159 and Stock No: N7396. The 'Stock # Information' tab is selected and highlighted in yellow. The data table shows the following information:

Stock Number Information			
Stock No	N7396	Type	Control Panel
Owner	Uptake Demo	Market Segment	MSEPGGN - 0V1065 - General EPG
Status	Pending	Industry Code	1479 - Chemicals/CHEMICAL AND FERTILIZER MINING, NEC
	New Sales-CONVERSIONS - LEASE RPO	Application Code	E - Prime Power
Quote No		SIC Code	Accommodation & Food Services - Sic 72
		Registered OEM	NO
Additional CAT Discounts		SPAR Percent	0.00
Approved By		Date Approved	
PSQ Quote File	Configuration:		
	Uploaded By:		
Job Site			
Proposal Comments			
Consignment	No		
Model		Serial No	
Delivery Information			
Estimated Delivery Date		Engineer Req Onsite	NO
Actual Delivery Date		Field Service Branch	-
Witness Test Date		Delivery to Customer	
Site Test Date			

Tabs

Each item on the left menu has its own set of tabs containing different information. Click on the tab name to view that information. The current tab is highlighted in yellow.

Security

Summary

There are 3 levels of security - user level security, project and stock security, and security between companies.

User Level Security

Each user is assigned to a security group, which defines what information the user can edit, and what is read-only. It also defines what global menu items, left menu items, and tabs the user can see.

Company Security

All users can view other company's projects and stock numbers. Users can only edit information on projects and stock numbers that are owned by their company or included in their company group.

Project and Stock Number Security

Project and stock number security is determined by the project status and the stock number status. Project and stock information can only be edited if the project status is Pending or In Progress, otherwise all information is read-only.

The screenshot shows the 'Project Information' form in the iMACS application. The 'Status' dropdown menu is open, displaying the following options: Pending, In Progress, Pending, Complete, On Hold, Cancelled, and Non-Project Sale. The 'Project No' is 190159 and the 'Project Name' is 'Test for automation with stock'. The 'Owner' is 'Uptake Demo'. The 'Customer' is '1465994-AAD CONSTRUCTION INC'. The 'Main Sales Rep' is 'Aileen - Shannon'.

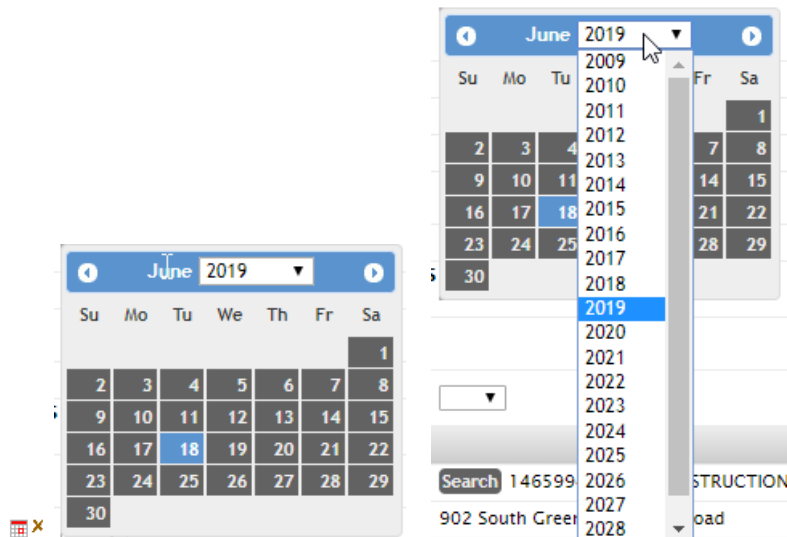
Stock summary information can be edited if the stock status is Pending or In Progress. Bills of material, purchase order, receiving, shipping, and project change request functions can only be used if the stock status is In Progress. All stock budgets can be edited when the stock status is Pending, but this information is read-only when the stock status is In Progress. To edit this information, you must issue a Project Change Request.

The screenshot shows the 'Stock Information' form in the iMACS application. The 'Status' dropdown menu is open, displaying the following options: Pending, Pending, Ready For Approval, On Hold, and Cancelled. The 'Stock No' is N7396 and the 'Type' is 'Control Panel'. The 'Owner' is 'Uptake Demo'. The 'Market Segment' is 'MSEPGGN - 0V1065 - General EPG'. The 'Industry Code' is '1479 - Chemicals/CHEMICAL AND FERTILIZER MINING, NEC'. The 'Application Code' is 'E - Prime Power'. The 'SIC Code' is 'Accommodation & Food Services - Sic 72'. The 'Registered OEM' is 'NO'. The 'SPAR Percent' is '0.00'.

Using Forms

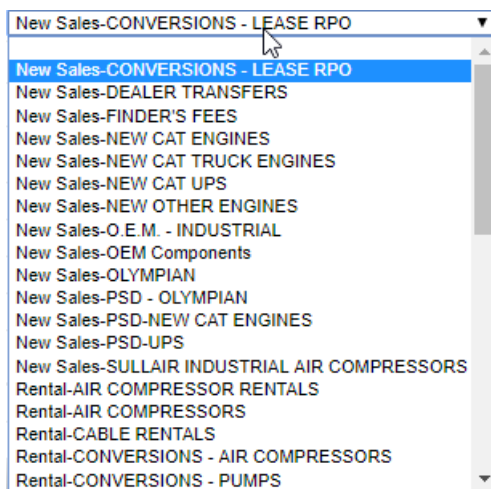
Calendar Control

A box that contains a calendar. Click the arrows to the left and right of the header to find a specific date. Click on the month name in the header to find a specific month. Click on the year in the header to find a specific year.



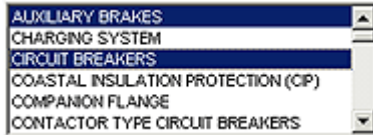
Combo Box

A text box with a drop-down list box. You can either type the first letter or select a choice in the box.



List Box

A box that contains a list of items. To select more than one item, hold the shift key down and click on the items.



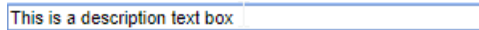
Buttons

A button that initiates an action when it is clicked.



Text Box

A box in which you can type text.



Check Box

An option you can turn on or off by selecting or clearing it. You can have more than one check box selected on a sheet at a time.

Engineer Req Onsite

Engineer Req Onsite

Check All

To check or uncheck all items in a list, click on the double checkmark button.

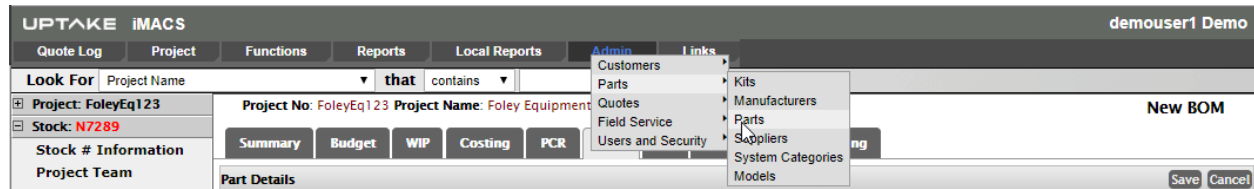


Add Selection

To add multiple items at once, click on the double check mark button to check all, or check off each item to add. Click the Add Sel button to add the checked items. To add one item at a time, click on the Add button next to the item to add.

Search Results			
Part Name	Manufacturer Part No	Manufacturer	
ANSI HARDWARE KITS	AC-HW-014	Silex Inc.	<input type="button" value="Add New"/> <input type="button" value="Add Sel"/> <input type="checkbox"/>
Exhaust Flex 8 inch CAT flange X 8 inch ANSI Flange 18 inch long	FF-8-18-221	Silex Inc.	<input type="button" value="View"/> <input type="button" value="Add"/> <input checked="" type="checkbox"/>
Exhaust Silencer hospital grade	JDDS-SI-8	Silex Inc.	<input type="button" value="View"/> <input type="button" value="Add"/> <input checked="" type="checkbox"/>
Gasket for 8 inch ANSI flange	AC-GS-008	Silex Inc.	<input type="button" value="View"/> <input type="button" value="Add"/> <input type="checkbox"/>
Gasket for 8 inch CAT exhaust	AC-GS-CA-008	Silex Inc.	<input type="button" value="View"/> <input type="button" value="Add"/> <input type="checkbox"/>
Hospital grade silencer	JDDS-14	Silex Inc.	<input type="button" value="View"/> <input type="button" value="Add"/> <input type="checkbox"/>

Parts



Searching for a Part

You can search for an existing part by entering a Keyword. This will search the Manufacturer Part #, Part Name, and Part Description fields for the Keyword. You can also choose a Manufacturer, Supplier, or System Category to filter or search for. Changing the Company will filter the list of Suppliers. Changing the Application category will filter the list of System Categories.

Parts Search

Parts Search					
Key words	<input type="text"/>	Manufacturer	<input type="text"/>		
Company	<input type="text"/>	Supplier	<input type="text"/>		
Application	<input type="text"/>	System	<input type="text"/>		
Include Inactive Parts <input checked="" type="checkbox"/>					
* Searches Manufacturer Part #, Supplier Part #, Part Name, Part Description, and Manufacturer Name <input type="button" value="Search"/>					
Part#	Part Name	Part Description	Manufacturer	Status	<input type="button" value="Add New"/>
0 --- 0 Total :0					

Adding and Editing a Part

To add a part, click the Add New button. You must choose a manufacturer and enter a part name. By changing the application category, the list of system categories is filtered. You can select more than one system category by holding down the Shift key while clicking. Click the Add>> button to add your selection.

To add a manufacturer to the list, choose Admin --> Parts --> Manufacturers from the global menu. To add a system category to the list, choose Admin --> Parts --> System Categories from the global menu.

To edit an existing part, search for the part and click the Edit button. Click the save button after the information has been updated.

Parts AddNew

Parts Search | **Part Details** | **Supplier** | **Interchangeable Parts** | **Where Used**

Part Details Save Cancel

Manufacturer:

Part #:

Part Name:

Part Description:

Application:

Category:

System Category: Add Remove

Status: Active InActive

Associating Suppliers

After a part has been created, you can list the suppliers that the part is available from. To add a supplier, click the Add New button and search for the supplier. Click the Add button next to the supplier you want to add.

To add a new supplier, choose Admin --> Parts --> Suppliers from the global menu.

UPTAKE iMACS demouser1 Demo

Quote Log | Project | Functions | Reports | Local Reports | Admin | Links

Look For: Project Name that contains Search

Supplier Search

Suppliers Search

Look For: Supplier Name that contains

Type: Existing iMACS Supplier Include Inactive Suppliers

Application: System:

Search

Supplier	Supplier No	City/State	Status		
.	L000059	IL	InActive	Edit	View Contact
.	L000003	Williston IL	Active	Edit	View Contact
.Other	L000006	Williston IL	Active	Edit	View Contact
Ace Doran	L000008	Williston IL	InActive	Edit	View Contact
Ace Mountings	L000010	Piper IL	Active	Edit	View Contact
Active Power	L000002	Port Aransas IL	Active	Edit	View Contact
Airline Hydraulics Corp	L000097	Pawlet IL	Active	Edit	View Contact
Alban Engine Power Systems	L000069	Rockdell IL	Active	Edit	View Contact
Altorfer	L000001	Wilmerding IL	InActive	Edit	View Contact
Altorfer Power Systems	L000094	Wilmerding IL	Active	Edit	View Contact
Amstech Power Products	L000021	Williston IL	Active	Edit	View Contact
ASCO	L000005	Ruby IL	Active	Edit	View Contact
ASI	L000007	Addington IL	Active	Edit	View Contact
Avtron - ASCO Power Technologies	L000004	Woodboro IL	Active	Edit	View Contact
BAKER TANKS, INC.	0022141	Rochelle Park IL	InActive	Edit	View Contact

1 2 3 4 5 6 7 Next >> 1 --- 15 Total :105

Interchangeable Parts

You can list parts that are interchangeable with the current part. To add an interchangeable part, click the Add New button and search for an existing part. Click the Add button next to the part you want to add.

UPTAKE iMACS demouser1 Demo

Quote Log Project Functions Reports Local Reports Admin Links

Look For Project Name that contains Search

InterChangeable Parts

Parts Search Part Details Supplier Interchangeable Parts Where Used

Manufacturer	Part #	Part Name	
Multiquip	1234	1234	Add New Delete

Suppliers

UPTAKE iMACS demouser1 Demo

Quote Log Project Functions Reports Local Reports Admin Links

Look For Project Name that contains Search

Supplier Search

Suppliers Search

Look For Supplier Name that contains Search

Type Existing iMACS Supplier

Application System

Include Inactive Suppliers

Supplier	Supplier No	City/State	Status
0 --- 0 Total :0			

Searching for a Supplier

You can search for a supplier by Supplier #, Supplier Name, City, or Province, or System Category. You can filter the search results by choosing a Company or System Category. Changing the Application category filters the list of System Categories.

Each supplier in the Search Results will either have an Add to iMACS button or an Edit button at the end of the row. If an Add to iMACS button appears, this means that the supplier exists in DBS, but has not been setup in iMACS. If an Edit button appears, this means that the supplier has been setup to use in iMACS.

If you need to add a new supplier, the supplier will have to be setup in DBS first. Supplier information in DBS is updated once a day.

UPTAKE iMACS demouser1 Demo

Quote Log Project Functions Reports Local Reports Admin Links

Look For Project Name that contains Search

Supplier Search

Suppliers Search

Look For Supplier Name that contains Search

Type Suppliers not setup in iMA

Application System

Include Inactive Suppliers

Supplier	Supplier No	City/State	Status	
----- DO NOT USE---USE 0252413 ***	0277501	Juntura IL	Inactive	Add To iMACS
#1 TIRE COMPANY, INC	0257015	Sister Lakes IL	Inactive	Add To iMACS
*** DO NOT USE ***	0099397	Williston IL	Inactive	Add To iMACS
*****DO NOT USE*****USE 0061201	0061202	Keene IL	Inactive	Add To iMACS
*****DO NOT USE**** USE 0201102 ****	0201001	Heron Bay IL	Inactive	Add To iMACS
*****DO NOT USE****(USE 0011361)***	0193301	Keene IL	Inactive	Add To iMACS
*****DO NOT USE*** (USE 0285504)**	0188901	Juntura IL	Inactive	Add To iMACS
*****DO NOT USE*****	0178504	Beckemeyer IL	Inactive	Add To iMACS
*****DO NOT USE***** (USE 0096601)	0097001	Williston IL	Inactive	Add To iMACS
*****DO NOT USE*****	0193991	Kelsay IL	Inactive	Add To iMACS

Adding and Editing a Supplier

To add a supplier to iMACS, click the Add to iMACS button. After the Save button is clicked, the Supplier #, Supplier Name, Address, and Currency will be added from DBS into iMACS.

To edit an existing supplier in iMACS, click the Edit button.

The supplier phone number, fax number, email, etc. can be updated. This data will only appear in iMACS, not in DBS. Multiple contacts can also be listed for each supplier, and they can each have their own address listed, or assume the address of the supplier. The Availability checkboxes are used to filter the suppliers that are used on bill of material and purchase orders by company.

UPTAKE iMACS demouser1 Demo

Quote Log Project Functions Reports Local Reports Admin Links

Look For Project Name that contains Search

Supplier Details

Supplier Search Supplier Details

Supplier Details

Supplier # L000003

Supplier Name -

Address 257 East Green Fabien Road
257 East Green Fabien Road
257 East Green Fabien Road
Williston
IL 26020 US

First Name	Last Name	Title	Phone #	Fax #	Email	Address	
Johnathon Cole	Mr		2121005726	2121005708	igxzmed.rrjgtykpp@szuewqh.gouml-.net	same as supplier	Add New Edit Delete

Go Back

Comments

Multiple comments can be listed for each supplier.

KITS

UPTAKE iMACS v4 QA ServerQuote_Log

Quote Log Project Functions Reports Local Reports Admin Links

Look for Project Name that contains Search

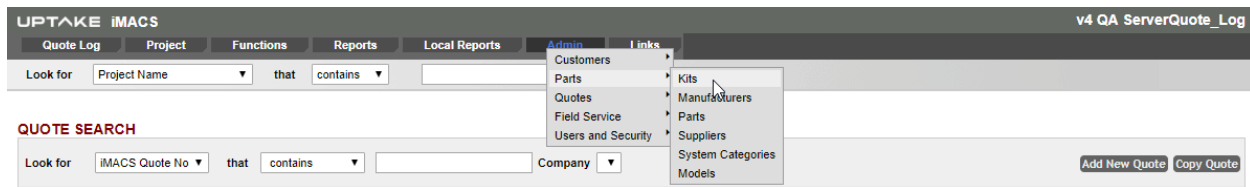
QUOTE SEARCH

Look for iMACS Quote No that contains Company Add New Quote Copy Quote

- Customers
- Parts
- Quotes
- Field Service
- Users and Security
- Kits
- Manufacturers
- Parts
- Suppliers
- System Categories
- Models

Searching for a Kit

You can search for an existing kit by Kit # or Description. Enter a keyword and click the Search button.

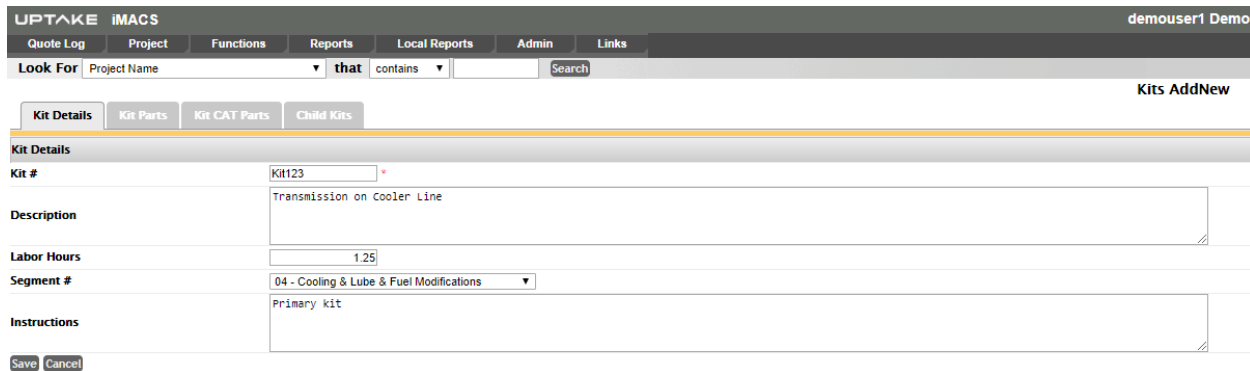


Adding and Editing a Kit

To add a kit, click the Add New button. You must enter a kit #.

To edit an existing kit, search for the kit and click the Edit button. Click the save button after the information has been updated.

To add a file attachment, click the Browse button, search for a file, and click Open, then click the Attach button. To view an attachment, click on the link on the file name.



Adding Parts to a Kit

After a kit has been created, you can list the parts that make up that kit. To add a part, click the Add New button and search for the part. Click the Add button next to the part you want to add. Then enter the quantity required for the kit.

To add a new part, choose Admin --> Parts --> Parts from the global menu.

UPTAKE iMACS demouser1 Demo

Parts Search

Parts Search

Key words Manufacturer

Company Supplier

Application System

Include Inactive Parts

* Searches Manufacturer Part #, Supplier Part #, Part Name, Part Description, and Manufacturer Name

Part#	Part Name	Part Description	Manufacturer	Status	Add New
(1) 200A ATS	(1) 200A ATS	Equipment -- UserDefined	Multiquip	Inactive	Edit
(2) 100A ATS	(2) 100A ATS	Equipment -- UserDefined	Multiquip	Inactive	Edit
10 AMP CHARGER	10 AMP CHARGER	10 Amp battery charger	Sens	Inactive	Edit
10 ZONE	10 ZONE	AREA PROTECTION PANELS - 10 ZONE, 3 PHASE	unused..	Inactive	Edit
10" ANSI - SS Exhaust Gasket - Double jacketed	10" ANSI - SS Exhaust Gasket - Double jacketed	10" ANSI - Stainless Steel - Exhaust Gasket - Double jacketed	Boulden Co.	Active	Edit Add
12" ANSI - SS Exhaust Gasket - Double jacketed	12" ANSI - SS Exhaust Gasket - Double jacketed	12" ANSI - Stainless Steel - Exhaust Gasket - Double jacketed	Boulden Co.	Active	Edit Add

Creating a New Project

Before You Start

The customer must already have an existing customer number in DBS. You must also know the billing currency, deposit before delivery, credit release #, date that the credit was approved, and who it was approved by.

To create a new project, choose New Project from the Project menu.

UPTAKE iMACS

Quote Log **Project** Functions

Look For Project

Stock Ready for Appro

M1664072

M4914471

Pending BOMs: 14

M0262057: 1

M2288573: 1

- New Project
- Projects Dashboard
- All Projects
- Pending Projects
- In Progress Projects
- Complete Projects
- On Hold Projects
- Cancelled Projects

Project I

FoleyEq

990999

190204

Project Information

If Generate number is checked, a project # will be generated when the project information is saved. The project number will be 6 digits long. The first 2 digits are the last 2 digits of the current year. The next 4 digits are an incremental number that resets at the beginning of each

year.

If Generate number is unchecked, a project number can be manually entered.

UPTAKE iMACS
demouser1 Demo

New Project Information

Information

Customer Contacts

Project Team

Save Cancel CopyProject

Project Information

Project No

Generate Number

Project Name

Owner

Status

Pending

Hold For Approval

Project Ready For Management Review

Retainage

Customer PO #

Customer

Add Customer Address as a Shipping Address

Main Sales Rep

Job Site

Comments

Workflow Status

Ready For Handoff

Ready For Washout

No

Payment Information

Billing Currency

USD

TAX1 Exempt #

Deposit Before Delivery

TAX2 Exempt #

Tax Percentage

0.00

%

Customer Contacts

The Customer Contacts tab is a list of all customer contacts for the project. The Commercial, Drawing, and Technical Contacts are chosen from the customer contacts list.

Project Team

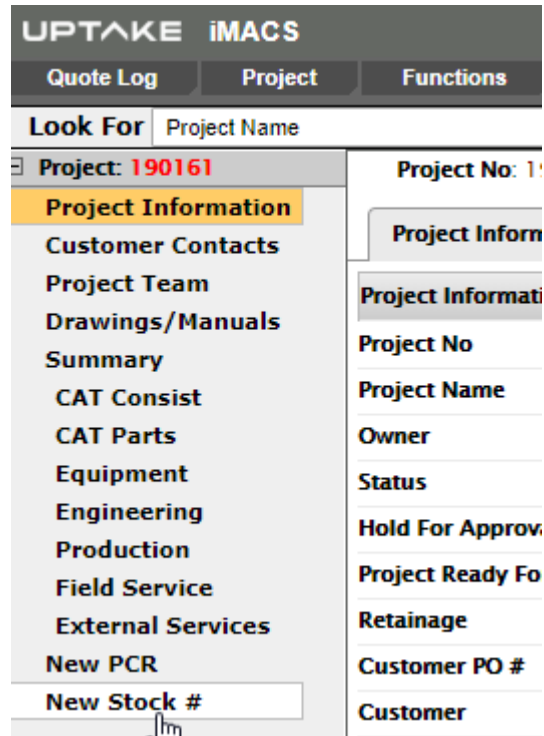
Project Leader, Sales Rep, and PSSR are chosen from a list of company employees that exists in iMACS.

Creating a New Stock

Before You Start

Each stock number belongs to a project. You must [create a project](#) before you can create a stock number. You must also know the stock type, SPAR, market segment, industry code, application code, delivery date, and end user company name, and end user company country.

To create a new stock number, choose New Stock # from the project level of the left menu.



Stock Information

This section describes how to create a stock number manually. You can also create a stock number by [copying an existing stock number](#).

If Generate number is checked, a stock # will be generated when the stock information is saved. The stock number will be 8-9 characters long. The first character is the company prefix of the owner of the stock number. The next 6 digits is the project number. The last 1-2 characters are the stock letter, starting and incrementing at A and ending at ZZ.

If generate number is unchecked, a stock number can be manually entered.

Stock Information		Features	Financials	Drawings	Shipping	Production Instructions
Stock Number Information						Copy Stock No.
Stock #	Generate number	<input checked="" type="checkbox"/>				
Status	Pending	Type	<input type="text"/>			
Owner	Power Systems	Market Segment	<input type="text"/>			
Quote #	<input type="text"/>	Quote File	<input type="text"/> Browse...			
Delivery Information						
Delivery Date	Jul 11, 2001	Engineer Req Onsite	<input type="checkbox"/>			
Witness Test Date	Jul 11, 2001	Field Service Branch	<input type="text"/>			
Site Test Date	Jul 11, 2001					
End User Information						
Company Name	<input type="text"/>					
Address	<input type="text"/>					
City	<input type="text"/>	Contact First Name	<input type="text"/>			
Province	<input type="text"/>	Contact Last Name	<input type="text"/>			
Postal Code	<input type="text"/>	Phone #	<input type="text"/>			
Country	<input type="text"/>	Fax #	<input type="text"/>			
		Email	<input type="text"/>			
Save		Cancel				

Features

The type of stock chosen will determine what features are available for a stock number. If Control Panel is chosen as the type, the features available are Make and Model. If Gen Set is chosen, the features will include engine model, volts, generator make and model.

Financials

The financial information can be manually entered, or imported from Power Systems Quoter (this function is only available for Power Systems stock numbers).

To enter the financial information manually, enter the Sell Price, GP Total, and GP Percent. Currency defaults to CAD, FX Rate to 1, and Sell Price CDN to the Sell Price multiplied by the FX Rate. If the currency is changed to anything other than CAD, a box will appear to enter the FX Rate. After the FX Rate is changed, the Sell Price CDN will be updated. If the Sell Price or GP Total is changed, the GP Percent will be updated. If the GP Percent is changed, the GP Total will be updated.

UPTAKE iMACS		demouser1 Demo	
		Financials	
Stock Information	Features	Payment	Financials
Shipping	Production Instructions	>>	
Financial Summary			
Sell Price		0.00	
Costs		0.00	
GP Total		0.00	
GP Percent		0.00	
Financial Details			Save Cancel Import PSQ
Sell Price	<input type="text" value="0.00"/>		
Currency	<input type="text" value="USD"/>		
FX Rate		1.00	
CAT Consist FX Rate	<input type="text" value="1.00"/>		
Inland Freight USD	<input type="text" value="0.00"/>		
Local Freight USD	<input type="text" value="0.00"/>		
Local Duty USD	<input type="text" value="0.00"/>		
Ocean Freight	<input type="text" value="0.00"/>		
Created : Demo user1, Jun 24, 2019			

To import the financial information from Power Systems Quoter, click the Import button in the top right corner. A new window will open and list any existing quote files for this stock number. Choose an existing file or click Browse, find the quote file, click Open, then click Upload.

The screen will now show the quote number and the configuration name. Choose a configuration name, and click Go. The data from the quote file will be displayed. Click on the Add or Add Sel button.

NOTE: The financial summary information should be imported before the CAT Consist budget information is imported. The CAT Consist budget is entered in US dollars. If the CAT Consist budget is entered first, all line items will be listed as FX Rate 1.

Drawings

The Drawing Information section includes if the customer requires drawings, how many, when, and the type of drawings. The Manual Information section includes the quantity and date required, and the Toromont branch they will be sent to.

Shipping

The Shipping tab is a list of all available shipping addresses for this stock number. This list will be used to determine where equipment will be shipped.

Instructions

Instructions can be entered for both Production and Field Service. You must choose a segment from the drop-down list for each instruction entered.

Required Tools

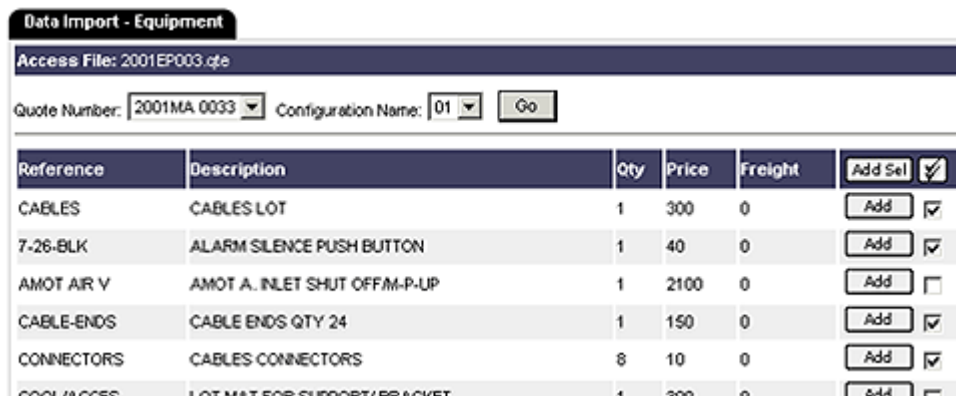
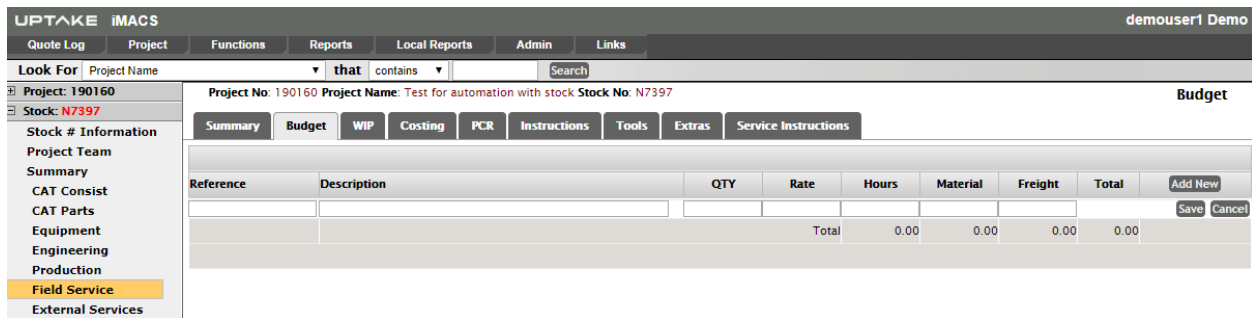
Required Tools for Field Service can be chosen from a drop-down list, and can indicate if the tool is required for the site test, and if it's being supplied by the customer. If a tool does not appear in the list, it can be added by choosing Admin --> Field Service --> Field Service Tools from the top menu of the main window.



Budget

Each class in a stock number has its own budget. The budget line items can be manually entered, or imported from Power Systems Quoter (this function is only available for Power Systems stock numbers).

To create a budget manually, click add new and enter the information including description, quantity, and unit cost, then click save. Repeat this for all budget line items, for each class.



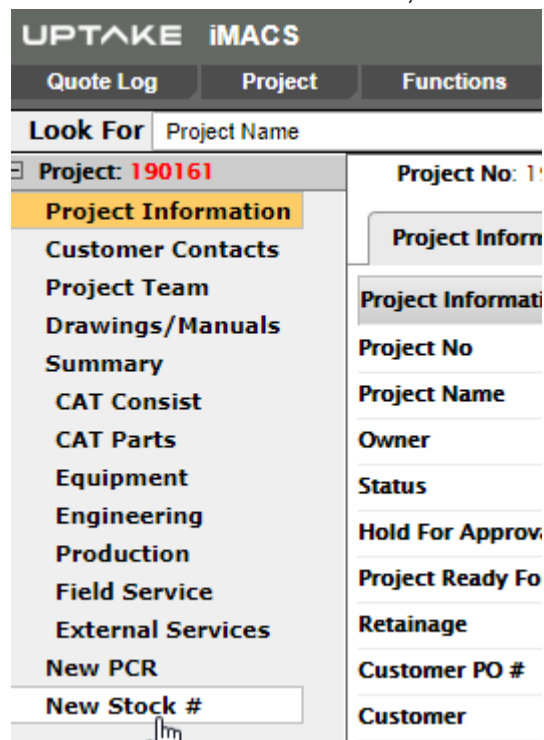
NOTE: The financial summary information should be imported before the CAT Consist budget information is imported. The CAT Consist budget is entered in US dollars. If the CAT Consist budget is entered first, all line items will be listed as FX Rate 1.

Copy an Existing Stock

Before You Start

Each stock number belongs to a project. You must create a project before you can create a stock number.

To create a new stock number, choose New Stock # from the project level of the left menu.



Stock Information

This section describes how to create a stock number by copying an existing stock number. You can also [create a stock number manually](#).

Enter an existing stock or project number, and click Search.

Under Information to Copy, check off which data will be copied. To copy any bill of materials, the equipment budget must be copied. When the bill of materials is copied, the status of all parts is set to Pending.

All matching stock numbers from the search are listed at the bottom. Click the Copy button next to the stock number you want copied.

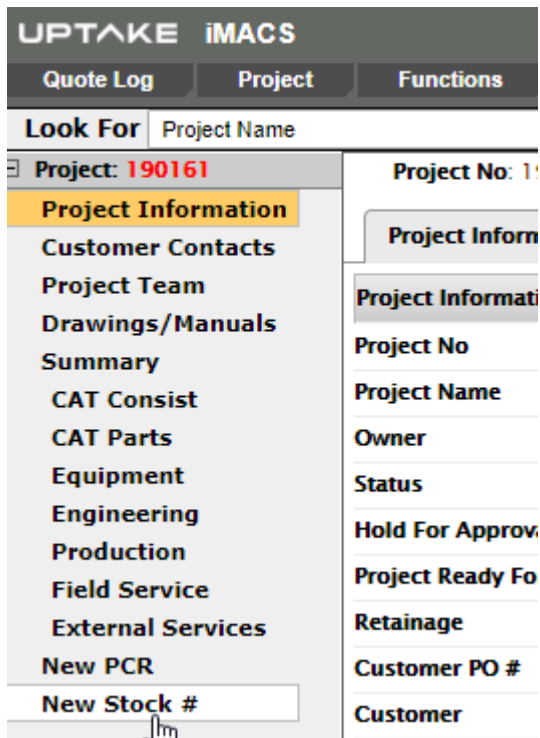
UPTAKE iMACS		demouser1 Demo	
Copy Stock			
Copy Existing Stock Number			
Stock Number Search			
Look For	Stock No ▼	which contains	7397
<input type="button" value="Search"/>			
Owner			
Owner of New Stock #	▼ *		
Number of Stock Numbers to Create	1		
CAT Consist			
CAT Consist FX Rate	1.00		
Information to Copy			
<input checked="" type="checkbox"/> Stock Information	<input checked="" type="checkbox"/> CAT Parts Bill of Materials		
<input checked="" type="checkbox"/> Stock Features	<input checked="" type="checkbox"/> Equipment Bill of Materials		
<input checked="" type="checkbox"/> Financial Summary	<input checked="" type="checkbox"/> External Services Bill of Materials		
<input checked="" type="checkbox"/> Equipment Budget	<input checked="" type="checkbox"/> Instructions		
<input checked="" type="checkbox"/> Labor Budget	<input checked="" type="checkbox"/> Field Service Required Tools		
<input checked="" type="checkbox"/> Component Locations			
Project No	Project Name	Stock No	
190160	Test for automation with stock	N7397	<input type="button" value="Copy"/>

Transfer An Existing Stock

Before You Start

Each stock number belongs to a project. You must [create a project](#) before you can transfer a stock number into it.

To transfer a new stock number, choose New Stock # from the project level of the left menu, then click the Transfer Stock No button.



Stock Information

This section describes how to transfer an existing stock number. When a stock number is transferred, it is moved from one project to another, not copied. You can also [create a stock number manually](#).

Enter an existing stock or project number, and click Search.

All matching stock numbers from the search are listed at the bottom. Click the Transfer button next to the stock number you want transferred.

Project Information

Project Information

The Project Information tab includes summary information about the project, including the project number and name, customer name, and credit information. To edit the information, click the Edit button. After the information has been updated, click the Save button.

UPTAKE iMACS demouser1 Demo

Quote Log Project Functions Reports Local Reports Admin Links

Look For Project Name that contains Search

Project: 190160 Project No: 190160 Project Name: Test for automation with stock Stock No:

Project Information

Project Information Customer Information Project Files Project Schedule Activities Outstanding Activities Completed

Project Information Edit Delete

Project No: 190160
 Project Name: Test for automation with stock
 Owner: Uptake Demo
 Status: Pending
 Hold For Approval: NO
 Project Ready For Management Review

Retainage
 Customer PO #
 Customer: 1465994-AAD CONSTRUCTION INC
 Main Sales Rep: Aileen Shannon

Job Site
 Comments

Workflow Status
 Ready For Handoff: NO Ready For Washout: NO

Payment Information
 Billing Currency: USD TAX1 Exempt #
 Deposit Before Delivery: No TAX2 Exempt #
 Tax Percentage: 0.00 %

Credit Information
 Credit release 1 - Deposit Only
 Date Issued
 Hold For Approval: NO
 Credit Pending: NO

Approved By
 Comments

Credit Approval
 Initial Credit Check: Approval Request Comments
 Auth. Ship Credit Check: Approval Request Comments
 Start Up Credit Check: Approval Request Comments
 100% Payment Received:

Created : cloudlinkmonitor CLMonitor, Feb 20, 2019

Customer Information

The Customer Information tab shows information from DBS for the customer of the current project. The customer can be changed in the Project Information tab.

UPTAKE iMACS demouser1 Demo

Quote Log Project Functions Reports Local Reports Admin Links

Look For Project Name that contains Search

Project: 190160 Project No: 190160 Project Name: Test for automation with stock Stock No:

Customer Information

Project Information **Customer Information** Project Files Project Schedule Activities Outstanding Activities Completed

Address Edit Delete
 1465994 - AAD CONSTRUCTION INC
 902 South Green Clarendon Road
 Crystal Hill IL
 44995
 2121018199
 No extended details available

G

Division Details Edit
 Size: SMALL 1 to 3 (S)
 Industry 1: INDUSTRIAL AND COMMERCIAL MACHINERY (3599)
 PSSR: Gloria Blackburn(Rep No:MKT - PAR4)

Expenditures (YTD)
 Sales: USD0.00 Parts: USD0.00
 Rental: USD0.00 Service: USD0.00

Influencers Add New

Project Files

When a project is created, a set of network directories are created. The project files tab displays all of these directories and the files in them. To view these files, click on the file link. You must have the associated program installed on your computer in order to view the file.

Customer Contacts

Overview

The All Contacts tab is a list of all customer contacts for the project. The Commercial, Drawing, and Technical Contacts are chosen from the customer contacts list.

The screenshot shows the 'Customer Contacts' tab for Project 190160. The contact details for Trina Tucker are displayed, including her role as 'Rental Influencer' and her address. The 'Contact' section shows that 'Commercial Contact', 'Drawing Contact', and 'Technical Contact' are selected.

Project Team

Overview

Project Leader, Sales Rep, and PSSR are chosen from a list of company employees that exists in iMACS.

The screenshot shows the 'Project Team' tab for Project 190160. A table lists team members with the following columns: Role, Name, Title, Sales Office, Phone, Fax, and Email. The table includes roles such as Commissions, CSR, Engineering Manager, Estimator, High Spec, Packaging Manager, Project Leader, PSSR, Sales Manager, Sales Rep, Standard Product, and Electrical Engineer.

Role	Name	Title	Sales Office	Phone	Fax	Email
Commissions	waliag Demo		Uptake Demo			greg.walia@uptake.com
CSR			All			
Engineering Manager	waliag Demo		Uptake Demo			greg.walia@uptake.com
Estimator			All			
High Spec			All			
Packaging Manager			All			
Project Leader			All			
PSSR			All			
Sales Manager			All			
Sales Rep			All			
Standard Product			All			
Defaults for Stock Numbers:						
Electrical Engineer			All			

Stock Information

Stock Information

The Stock Information tab includes summary information about the stock, including the stock number and end user company name, and delivery dates. To edit the information, click the Edit button. After the information has been updated, click the Save button.

UPTAKE iMACS demouser1 Demo

Quote Log Project Functions Reports Local Reports Admin Links

Look For Project Name that contains Search

Project: 190160 Project No: 190160 Project Name: Test for automation with stock Stock No: N7397 Stock Info

Stock: N7397

Stock # Information Stock # Features Payment Information Project Schedule Locks

Project Team Summary CAT Consist CAT Parts Equipment Engineering Production Field Service External Services

Stock Number Information Edit Delete

Stock No	N7397	Type	Control Panel
Owner	Uptake Demo	Market Segment	MSEPCGN - 0V1065 - General EPG
Status	Pending	Industry Code	1479 - ChemicalsCHEMICAL AND FERTILIZER MINING, NEC
Quote No	New Sales-CONVERSIONS - LEASE RPO	Application Code	E - Prime Power
		SIC Code	Accommodation & Food Services - Sic 72
		Registered OEM	NO
Additional CAT Discounts		SPAR Percent	0.00
Approved By		Date Approved	
PSQ Quote File	Configuration:		
	Uploaded By:		
Job Site			
Proposal Comments			
Consignment	No		
Model		Serial No	
Delivery Information			
Estimated Delivery Date		Engineer Req Onsite	NO
Actual Delivery Date		Field Service Branch	-
Witness Test Date		Delivery to Customer	
Site Test Date			
DSR/Warranty Date		Special Instructions	
Engine Order Date		Delivery from CAT	
Requested Factory RTS Date		Date Shipping From 3rd Party Packager	
		Special Instructions	
All CAT Discounts Applied		Export	NO
End User Information			
Company Name	1465994 - AAD CONSTRUCTION INC	Contact	on
Address	902 South Green Clarendon Road	Phone #	on
	Crystal Hill IL 44995	Fax #	
Country		Email	
Customer Type	Not CAT Dealer		

Created : cloudlinkmonitor CLMonitor, Feb 20, 2019

Stock Features

The type of stock chosen will determine what features are available for a stock number. If Control Panel is chosen as the type, the features available are Make and Model. If Gen Set is chosen, the features will include engine model, volts, generator make and model.

Project Files

When a project is created, a set of network directories are created. The project files tab displays all of these directories and the files in them. To view these files, click on the file link. You must have the associated program installed on your computer in order to view the file.

Drawings/Manuals

Drawings

Drawings are listed under the Electrical and Mechanical tabs. Drawings can be added by clicking the Add New button and filling in the information tabs. Files can be attached to each drawing listed. To view an attached file, click the paper clip icon next to the file name.

Summary	Electrical	Mechanical	Transmittals	Manuals - Customer	Manuals - Internal
Drawing #	Title	Revision	Required	File Attachment	Add New
3570581	Baseplate (JLG#)	1	02-May-01	ModeCode.txt	Edit Delete
A00740	Label, Wire Harness	2	03-May-01		Edit Delete
A00804	Oil Temperature Probe Body	1	03-May-01		Edit Delete
A00815	Oil Temperature Probe	1	20-May-01		Edit Delete
dfsdf	sdf	1			Edit Delete

Transmittals

Transmittals are a way to track when drawings are sent back and forth to the customer, and to internal departments. The Transmittal tab defaults to a list of existing transmittals.

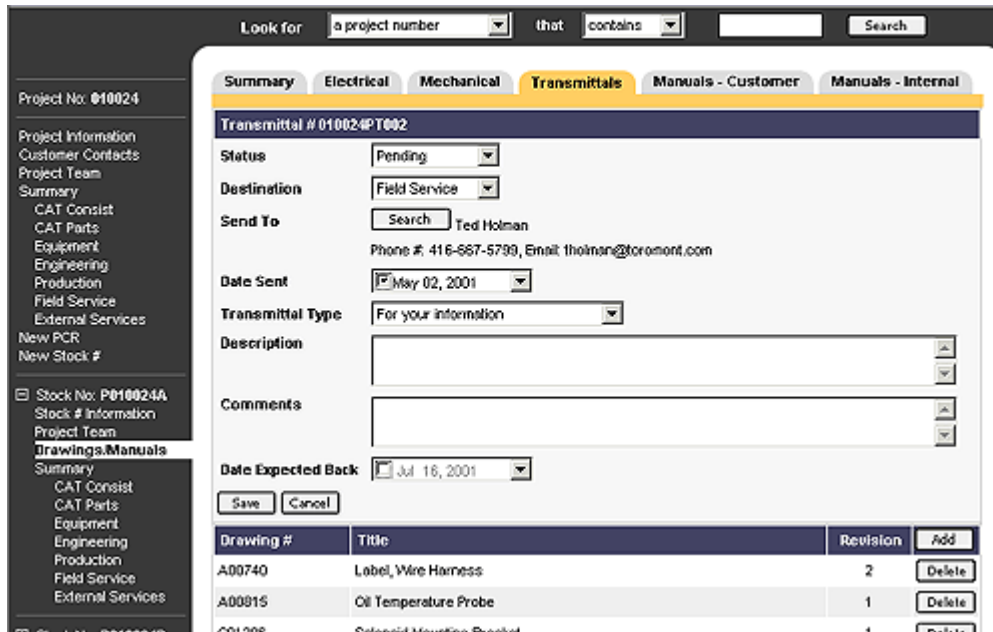
To create a Transmittal, click the Add New button. Choose a destination, and then click the Search button to find a contact. If the destination is Customer, the list of customer drawing contacts is shown, otherwise a list of employees for your company is shown. Click the Add button next to the name you want to add. You must also choose a date sent. Click the Save button after all the information has been entered. The system will generate a transmittal

number.

To list the drawings that were sent with the transmittal, click the Add button under the transmittal header. The list of electrical drawings is shown in the pop-up window. To view the mechanical drawings, choose Mechanical from the drop-down box in the top left corner. Click the Add button next to the drawing you want to add to the transmittal.

Drawings			
Electrical			
Drawing #	Title	Revision	
3570581	Baseplate (JLG#)	1	Add
A00740	Label, Wire Harness	2	Add
A00804	Oil Temperature Probe Body	1	Add
A00815	Oil Temperature Probe	1	Add
dfsd	sdf	1	Add

To edit the transmittal header information, click the Edit button, and click Save after all the information has been updated. To remove a drawing from the transmittal, click the Delete button next to the drawing.



Manuals

There are 2 tabs for Manuals - one for manuals sent to the customer, the other for manuals used internally. To edit the Date Issued and Comments, click the Edit button. To list the drawings that are included in the manual, click Add New. The list of electrical drawings is shown in the pop-up window. To view the mechanical drawings, choose Mechanical from the drop-down box in the top left corner. Click the Add button next to the drawing you want to add to the manual.

Drawings

Electrical

Drawing #	Title	Revision	Add
3570581	Baseplate (JLG#)	1	Add
A00740	Label, Wire Harness	2	Add
A00804	Oil Temperature Probe Body	1	Add
A00815	Oil Temperature Probe	1	Add
dfsdf	sdf	1	Add

To delete a drawing from the manual, click the Delete button next to the drawing. The bottom section of the screen lists all materials from the CAT Parts and Equipment bill of materials where the Include In Manual field was checked off.

Manual Transmittal

Date Issued: 02-May-01

Comments: [Edit]

Type	Drawing #	Title	Revision	Add New
Electrical	3570581	Baseplate (JLG#)	1	Delete
Electrical	A00740	Label, Wire Harness	2	Delete
Electrical	A00815	Oil Temperature Probe	1	Delete
Mechanical	A00805	Oriface Adapter, Oil Pressure	1	Delete
Mechanical	C01205	Solenoid Mounting Bracket	1	Delete

Manufacturer	Part #	Description
Schenker Canada	29450	SDE Trip Contact, Form C
Action Instruments	G128-0001	Relay for winding J-Type Thermocouples
DEC	SH2B-05	SOCKET FOR SHR & HORN RELAYS STANDARD DIN RAIL MOUNT

Summary

Overview

All classes and summary levels of a stock number and project have Summary tabs.

Summary tabs on the stock class level shows the initial budget total, the total amount of project change requests, the current budget total, the amount of issued purchase orders in iMACS (for CAT Parts, Equipment, and External Services classes only), the total of DBS costing transactions, and the variance.

Summary	Budget	Costing	PCR	BOM	RFQ	PO	Receiving	PO Invoices
Initial	PCRs	Current	Issued POs	DBS Costs	Variance			
31,196.00	19,196.21	50,392.21	10,990.13	0.00	(10,990.13)			

The summary tab on the stock summary level shows a summary of all class budgets, PCRs, and costs, as well as the sell price and gp.

Look for that

Project No: 010024

Project Information
Customer Contacts
Project Team
Summary
CAT Consist
CAT Parts
Equipment
Engineering
Production
Field Service
External Services
New PCR
New Stock #

☐ Stock No: P010024A
Stock # Information
Project Team
Drawings/Manuals
Summary
CAT Consist

Class	Initial	PCRs	Current	Issued POs	DBS Costs	Variance
CAT Consist	77,663.93	0.00	77,663.93	0.00	0.00	0.00
CAT Parts	1,000.00	0.00	1,000.00	57.02	0.00	(57.02)
Equipment	31,196.00	25,111.69	56,307.69	10,990.13	0.00	(10,990.13)
Engineering	4,000.00	0.00	4,000.00	0.00	0.00	0.00
Production	9,727.00	0.00	9,727.00	0.00	0.00	0.00
Field Service	3,891.00	0.00	3,891.00	0.00	0.00	0.00
External Services	0.00	2,500.00	2,500.00	4,500.00	0.00	(4,500.00)
	127,477.93	27,611.69	155,089.61	15,547.15	0.00	(15,547.15)

	Initial	PCRs	Current	Actual
Sell Price CDN	73,761.95	220,838.05	294,600.00	0.00
DBS Costs	-	-	-	0.00
GP Total	7,376.19	12,623.61	20,000.00	0.00
GP Percent	10.00%	(3.00%)	7.00%	0.00%

The summary tab on the project class level shows a summary of the the budget, PCRs, and costs for that class for all stock numbers for your company. If your company is the owner for the project, you can also view the summary for the project by choosing Project Summary from the drop down box.

Look for that

Project No: 010024

Project Information
Customer Contacts
Project Team
Summary
CAT Consist
CAT Parts
Equipment
Engineering
Production

Summary
PCR
BOM
RFQ
PO
Receiving

Power Systems

Stock	Initial	PCRs	Current	Issued POs	DBS Costs	Variance
P010024A	31,196.00	25,111.69	56,307.69	10,990.13	0.00	(10,990.13)
P010024B	45,951.71	1,500.00	47,451.71	1,100.25	0.00	(1,100.25)
P010024E	35.00	0.00	35.00	0.00	0.00	0.00
P010024I	23,906.00	0.00	23,906.00	0.00	0.00	0.00
	101,088.71	26,611.69	127,700.40	0.00	(12,090.38)	

The summary tab on the project summary level shows the total budget, PCRs, and costs by class for all stock numbers for your company. If your company is the owner for the project, you can also view the summary for the project by choosing Project Summary from the drop down box.

Look for that

Project No: 010017

Project Information
Customer Contacts
Project Team
Summary
CAT Consist
CAT Parts
Equipment
Engineering
Production
Field Service
External Services
New PCR
New Stock #

Stock No: E010017A
Stock No: E010017B
Stock No: P010017C
Stock No: M010017D

Summary | PCR | BOM | PO

Power Systems

Class	Initial	PCRs	Current	Issued POs	DBS Costs	Variance
CAT Consist	214,720.93	0.00	214,720.93	0.00	0.00	0.00
CAT Parts	1,252.00	50.00	1,302.00	10.00	0.00	(10.00)
Equipment	145,467.21	33,816.00	179,283.21	2,775.00	0.00	(2,775.00)
Engineering	4,000.00	0.00	4,000.00	0.00	0.00	0.00
Production	11,105.00	0.00	11,105.00	0.00	0.00	0.00
Field Service	3,891.00	0.00	3,891.00	0.00	0.00	0.00
External Services	2,500.00	100.00	2,600.00	500.00	0.00	(500.00)
	302,936.13	33,966.00	416,902.13	3,285.00	0.00	(3,285.00)

	Initial	PCRe	Current	Actual
Sell Price CDN	294,800.00	0.00	294,800.00	0.00
DBS Costs	-	-	-	0.00
GP Total	20,000.00	0.00	20,000.00	0.00
GP Percent	0.07%	0.00%	0.07%	0.00%

Budget

Overview

The budget functions are available for the summary and all classes of a stock number. The format of the budgets between companies is slightly different, and is determined by the owner of the stock number. The budget can initially be entered when the [stock number is created](#). It can also be edited in the summary or in each class on the left menu on the stock level, only while the status of the stock number is Pending. After the stock status has been changed to In Progress, the budget is "locked", and a Project Change Request must be issued in order to change the budget.

UPTAKE iMACS demouser1 Demo

Quote Log | Project | Functions | Reports | Local Reports | Admin | Links

Look For that

Project: 170013 Project No: 170013 Project Name: TEST 0227141145 Stock No: M1934627 **Budget**

Stock: M0288774
Stock: **M1934627**

Stock # Information
Project Team
Summary
CAT Consist
CAT Parts
Equipment
Engineering
Production
Field Service
External Services
Stock: M1991920

Summary | Budget | WIP | Costing | PCR | BOM | RFQ | PO | Expediting | Receiving | PO Invoices

Reference	Description	QTY	Unit Cost	Freight	Total
230a_400a ats	Electrical - ADDITIONAL WINDING PROTECTION -	1	4,892.00	0.00	4,892.00
400a 480v OT	Electrical - Transfer Switch - 400a 480v 3p 4w Nema 1 EBL5	1	2,995.00	90.00	3,085.00
C15 - 1150 gal	Mechanical - Fuel Tank - 1150 gal lk dt, lvi alm, 5g sp	1	8,670.00	0.00	8,670.00
	Total			90.00	16,647.00

Summary Budget

The financial information can be manually entered, or imported from Power Systems Quoter (this function is only available for Power Systems stock numbers).

To enter the financial information manually, enter the Sell Price, GP Total, and GP Percent. Currency defaults to CAD, FX Rate to 1, and Sell Price CDN to the Sell Price multiplied by the

FX Rate. If the currency is changed to anything other than CAD, a box will appear to enter the FX Rate. After the FX Rate is changed, the Sell Price CDN will be updated. If the Sell Price or GP Total is changed, the GP Percent will be updated. If the GP Percent is changed, the GP Total will be updated.

UPTAKE iMACS demouser1 Demo

Quote Log Project Functions Reports Local Reports Admin Links

Look For Project Name that contains Search

Project No: 170013 Project Name: TEST 0227141145 Stock No: M1934627 Budget Summary

Summary Budget Costing PCR BOM PO Deficiencies Shipping Manual Invoices Manual Invoices Accounts Receivable Commission

Invoice

Financial Summary

Sell Price	0.00
Costs	377,267.09
GP Total	(377,267.09)
GP Percent	0.00

Financial Details

Sell Price	0.00
Currency	USD
FX Rate	1.00
CAT Consist FX Rate	1.00
Inland Freight USD	0.00
Local Freight USD	0.00
Local Duty USD	0.00
Ocean Freight	0.00
CAT Consist	357,920.09
CAT Parts	0.00
Equipment	16,647.00
Engineering	0.00
Production	0.00
Field Service	2,700.00
External Services	0.00

Created: Demo user3, Aug 28, 2015
Updated: Demo user3, Aug 28, 2015

To import the financial information from Power Systems Quoter, click the Import button in the top right corner. A new window will open and list any existing quote files for this stock number. Choose an existing file or click Browse, find the quote file, click Open, then click Upload.

The screen will now show the quote number and the configuration name. Choose a configuration name, and click Go. The data from the quote file will be displayed. Click on the Add or Add Sel button.

Class Budgets

Each class in a stock number has its own budget. The budget line items can be manually entered, or imported from Power Systems Quoter (this function is only available for Power Systems stock numbers).

To create a budget manually, click add new and enter the information including description, quantity, and unit cost, then click save. Repeat this for all budget line items, for each class.

Summary Budget Costing PCR BOM RFQ PO Receiving PO Invoices						
Original Budget						Import
Reference	Description	Qty	Unit Cost	Freight	Total	Add New
3408HS	8" HOSP. GRADE SILENCER	1	1,600.00	50.00	1,650.00	Delete
962600	ATS/962/600A/600V	1	22,256.00	0.00	22,256.00	Delete
					Total: 23,906.00	

To import a budget from Power Systems Quoter, click the Import button in the top right corner. A new window will open and list any existing quote files for this stock number. Choose an existing file or click Browse, find the quote file, click Open, then click Upload.

The screen will now show the quote number and the configuration name. Choose a configuration name, and click Go. The data from the quote file and for the current class will be displayed. Click on the Add button at the end of a row to add one specific record. Check off multiple boxes, then click the Add Sel button to add a selection of records. Or, click on the double checkmark button to select all records, then click the Add Sel button.

Data Import - Equipment						
Access File: 2001EP003.qfe						
Quote Number: 2001MA 0033		Configuration Name: 01		Go		
Reference	Description	Qty	Price	Freight	Add Sel	<input checked="" type="checkbox"/>
CABLES	CABLES LOT	1	300	0	Add	<input checked="" type="checkbox"/>
7-26-BLK	ALARM SILENCE PUSH BUTTON	1	40	0	Add	<input checked="" type="checkbox"/>
AMOT AIR V	AMOT A. INLET SHUT OFF-M-P-UP	1	2100	0	Add	<input type="checkbox"/>
CABLE-ENDS	CABLE ENDS QTY 24	1	150	0	Add	<input checked="" type="checkbox"/>
CONNECTORS	CABLES CONNECTORS	8	10	0	Add	<input checked="" type="checkbox"/>

Look for a project number that contains Search						
Summary Budget Costing PCR Order Board Order Receiving						
Original Budget						
Reference	Feature	Description	Qty	Unit Cost	Freight	Total COM
FX Rate 1-473						
	NONCERT	NON-CERTIFIED	1	0.00	0.00	0.00
	60H0600	60HZ 600 VOLTS	1	0.00	0.00	0.00
9Y-8156	STANDY	STANDBY POWER APPLICATION	1	0.00	0.00	0.00
CA-0597	EMCPLUS	EMCP TWO PLUS	1	800.00	0.00	1,178.40
	EMCPTWO	ELECTRONIC MODULAR CONTROL PNL	1	0.00	0.00	0.00
PA-5018	GOVEL01	1724 ELECTRONIC GOVERNOR	1	1,160.00	0.00	1,738.14
PP-5018	KAD0350	350 EKW/WIFAN	1	0.00	0.00	0.00
CA-0327	406DE26	3408 600 VOLT 60 HZ PGS	1	42,500.00	0.00	62,602.50
121-4714	EMCMETU	METRIC DISPLAY UNITS	1	0.00	0.00	0.00
121-4717	EMCAM07	ALARM MODULE - NFPA 110	1	343.00	0.00	505.24
121-4712	EMCLPAR	PANEL LIGHTS/AUXILIARY RELAY	1	63.00	0.00	122.26

To Edit budget line items, click the Edit button. After all changes have been made, click Save.

The drop down box in the top left corner shows the budget revisions. If Project Change Requests have been issued, the box will show the PCR numbers. You can view previous revisions of the budget by choosing Original Budget, or a Project Change Request number. If you are viewing any revision after the original budget, a Change field will be shown indicating which lines items were changed, and what type of change it was.

Reference	Description	Qty	Unit Cost	Freight	Total	Change
3408HS	8" HOSP. GRADE SILENCER	1	1,800.00	50.00	1,850.00	EDIT
962/600	ATS/962/600A/600V	1	22,256.00	0.00	22,256.00	-
COMM/ASCO	COMMISS.	1	1,540.00	0.00	1,540.00	-
DRIP3406	DRIPTRAY 36"L X 20"W X 2"H	1	130.00	0.00	130.00	-
EL150-K1	MURPHY COOLANT LEVEL SWITCH	1	100.00	0.00	100.00	-
FF-08-18	EXH. FLEX FF-8-18-241	1	300.00	40.00	340.00	-
FUEL/SOLEN	FUEL SOLENOID 3/4"-24VDC	1	180.00	0.00	180.00	-
MANUALS	MANUALS & DRAWINGS	4	50.00	0.00	200.00	-
MISC-3400	MISC MATERIALS FOR 3400	1	500.00	0.00	500.00	-
MISC/ELEC	MISC AL. FUEL L.	1	800.00	0.00	800.00	-
MOUN MAT	MOUNTING MATERIAL NELSON	1	100.00	0.00	100.00	-
RTD RELAY	RELAY FOR WINDING RTD'S/TCPLS	1	1,800.00	0.00	1,800.00	-
SCA	VULCAN B. CHARGER W/ALARMS	1	1,000.00	50.00	1,050.00	-
TEST	Project Change Request TEST	1	5,000.00	0.00	5,000.00	ADD
TOOLS	SET OF TOOLS & BOX	1	500.00	0.00	500.00	-
WNSLOW/I	NELSON-WNSLOW ABSORBER	1	400.00	0.00	400.00	-
					Total: 36,346.00	

Bill of Materials

Overview

Bill of Materials applies to the CAT Parts, Equipment, and External Services classes. On the project summary, project class, and stock summary level, the BOM tab defaults to a summary by stock number and class for each stock number for your company. On the stock class level, the BOM tab defaults to the list of the current budget. Each part added to the bill of materials must be associated with a budget item. Choose a budget item by clicking on a Reference number to add or view parts.

Comp Loc	Tag	Kit	Part #	Part Name	Part Desc	Manufacturer	QTY	Status
			10 AMP CHARGER	10 AMP CHARGER	Electrical - BATTERY CHARGER - 10 Amp battery charger	Not available	1	Ordered View
			C15	C15	Mechanical - FLEX EXHAUST - C15 flex, bolts, etc	Not available	1	Received View
							Items:	2
							Total Pending:	0.00
							Total Released:	1,300.00
							Total Cancelled:	0.00

The screen will then display a list of parts associated with the budget item.

Comp Loc	Tag	Part #	Description	Manufacturer	QTY	Status	
						Items:	0
						Total Pending:	0.00
						Total Released:	0.00
						Total Cancelled:	0.00

Adding a Part

To add a part, click the Add New button. Click the search button to add a part. You can search for an existing part by entering a Keyword. This will search the Manufacturer Part #, Part Name, and Part Description fields for the Keyword. You can also choose a Manufacturer, Supplier, or System Category to filter or search for. Changing the Company will filter the list of Suppliers. Changing the Application category will filter list of System Categories.

UPTAKE iMACS demouser1 Demo

Parts Search

Parts Search

Key words

Mnf Part #	Description	Manufacturer	UOM	Unit Cost	
5P9796	COMPARTMENT	CATERPILLAR	PC	57.91	<input type="button" value="Add"/>
0000 000 051 40 75	PARTICULATE FILTER	BUYRUS - EXPANDED MINING	EA	0.00	<input type="button" value="Add"/>

Click the Add button next to the part you want added to the bill of materials. You must choose a Status. The part can still be edited if the status is Pending. Once the status is changed to Released, the part will show in the PO tab as an outstanding item to be purchased, and no changes can be made. The status can be changed back to Pending through the PO - Outstanding tab. You must also choose a component location for the part. After all the information has been entered, click the Save button.

UPTAKE iMACS demouser1 Demo

Quote Log Project Functions Reports Local Reports Admin Links

Look For Project Name contains

Project: 151078 Project No: 151078 Project Name: CHOP Brandywine Valley SSC/ASC Stock No: M0262057 BOM Details

Stock: M0262057

Stock # Information
Project Team
Summary
CAT Consist
CAT Parts
Equipment
Engineering
Production
Field Service
External Services

Summary Budget WIP Costing PCR BOM PO Expediting Receiving

Part Details

Part # 5P9796

Part Description COMPARTMENT

Manufacturer CATERPILLAR

Unit Cost 57.91

Quantity 2 Date Required

Status Pending Comp Loc Air intake system

Budget Reference Spare Part - Parts - Spare Parts - Filters, Fuses, and Lamps

Internal Comments

External Comments

Customer Supplied NO

Tag #

Drawing #

Include in Manual NO

Procurement Code

Created : Demo user1, Jun 24, 2019

Updated : Demo user1, Jun 24, 2019

Editing a Part

To edit an existing part, choose a budget item by clicking on a Reference number, then click the View button. Click Edit, and after all the information has been updated, click Save. To release an item for purchasing, change the status to Released.

Adding a Kit

To add a kit to the bill of materials, choose a budget item by clicking on a Reference number, then click the Add Kit button. Search for a kit by entering a keyword and clicking Search. Click the

Add button next to the kit you want to add to the bill of materials.

UPTAKE iMACS demouser1 Demo

Kit Search

Kit Search

Look For that contains

Kit #	Description	Labor Hours	Segment #	
Cable Kit		10	00	<input type="button" value="Add"/>
Kit123	Transmission on Cooler Line	1.25	04	<input type="button" value="Add"/>

The screen will show a list of the parts that the kit is made up of. Choose a component location to associate the parts to, and click the Add button. All the parts are added to the bill of materials, and the Status defaults to Pending.

UPTAKE iMACS demouser1 Demo

Add Kit Details

Add Kit to Bill of Materials

Equipment Budget Ref

CAT Parts Budget Ref

Component Location

Quantity

Kit #	Description	Labor Hours	Segment #
Kit123	Transmission on Cooler Line	1.25	04

Manufacturer	Part #	Part Name	QTY	Drw Code
--------------	--------	-----------	-----	----------

Releasing Items

You can change the Status of a group of parts on the bill of materials to Received by clicking the Release Items button. To release all items in a class, click the Release Items button in the default screen of the BOM tab. To release all items associated with a specific budget item, click on a Reference number, then click the Release Items button.

To release all items for a stock number, click Release Items on the Stock summary level.

To release all items in a project for all stock numbers for your company for a class, click Release Items on the Project class level.

To release all items in a project for all stock numbers for your company, click Release Items on the Project summary level.

The screenshot shows the iMACS software interface. A dialog box is open in the center, asking for confirmation to release selected items. The dialog text reads: "use.cloudlink.uptake.com says Are you sure you want to Release the Selected Items". There are "OK" and "Cancel" buttons. Below the dialog, the BOM List is visible. The BOM List has columns for Comp Loc, Tag, Part #, Description, Manufacturer, QTY, and Status. The items listed are:

Comp Loc	Tag	Part #	Description	Manufacturer	QTY	Status
<input checked="" type="checkbox"/>		0L1124	GASKET	CATERPILLAR	10	Pending
<input type="checkbox"/>		5P9796	COMPARTMENT	CATERPILLAR	2	Pending
					Items:	2
					Total Pending:	150.73
					Total Released:	0.00
					Total Cancelled:	0.00

Request for Quotation

Overview

RFQs apply to the Equipment and External Services classes on the stock level. RFQS can be viewed on the project level as well. You can create a RFQ from the RFQ tab in the Equipment class, or in the Outstanding items list from the PO tab in both Equipment and External Services classes. A RFQ can only be printed when the status is Issued. Once the status has been changed to Issued, no changes can be made.

Creating a Request for Quotation

To create a RFQ, click the New RFQ button. The response required by field is optional. To add parts to the RFQ, click the Search button. The Parts Search window will pop up. Search for a part and click the Add button next to the part to be added to the RFQ. Enter the quantity and click the Save button. A RFQ number has been generated, and the Status set to Pending.

Editing a Request for Quotation

To edit the RFQ header information, click the Edit button. After the information has been updated, click Save.

UPTAKE iMACS demouser1 Demo

Quote Log Project Functions Reports Local Reports Admin Links

Look For Project Name that contains Search

Project: 151078 Project No: 151078 Project Name: CHOP Brandywine Valley SSC/ASC Stock No: M0262057 RFQ Details

Stock: M0262057

Summary Budget WIP Costing PCR BOM RFQ PO Expediting Receiving PO Invoices

Requests for Quotation

RFQ # A11078NRFQ001

Response Required By

Status Pending

Created: Demo user1 , Jun 24, 2019

Updated: Demo user1 , Jun 24, 2019

Manufacturer	Part #	Part Name	Part Description	QTY

Save Add Part Add New

Supplier	Contact	Phone #	Fax #	Email	Add New

Manufacturer Parts

You can list multiple parts for a RFQ. To add a part to the RFQ, click the Add button, search for a part, and click the Save button. Enter the quantity and click Save. To remove a part, uncheck the checkbox.

Suppliers

You can list multiple suppliers for a RFQ. To add a supplier to the RFQ, click the Add New button. Search for a supplier, and click the Add button. The window will then display all the contact listed for the supplier you chose. Click the Add button next to the contacts you want to use. To delete a supplier, click the delete button.

Printing

A RFQ can only be printed when the status is Issued. Click the Print button next to the suppliers listed.

UPTAKE iMACS demouser1 Demo

Quote Log Project Functions Reports Local Reports Admin Links

Look For Project Name that contains Search

Project: 151078 Project No: 151078 Project Name: CHOP Brandywine Valley SSC/ASC Stock No: M0262057 RFQ Details

Stock: M0262057

Summary Budget WIP Costing PCR BOM RFQ PO Expediting Receiving PO Invoices

Requests for Quotation

RFQ # A11078NRFQ001

Response Required By

Status Issued

Created: Demo user1 , Jun 24, 2019

Updated: Demo user1 , Jun 24, 2019

Manufacturer	Part #	Part Name	Part Description	QTY
Boulden Co.	10" ANSI - SS Exhaust Gasket - Double Jacketed	10" ANSI - SS Exhaust Gasket - Double Jacketed	10" ANSI - Stainless Steel - Exhaust Gasket - Double jacketed	0

Supplier	Contact	Phone #	Fax #	Email	Print
Airline Hydraulics Corp	Terrill Hodges	2121005776	2121001123	biofbgrq.mpbrcouv@mshobigot.seaept.net	Print

Purchase Orders

Overview

Purchase Order functions are available for the CAT Parts, Equipment, and External Services classes on both the project and stock level. The PO tab defaults to a list of existing purchase orders. Click on the PO number to view or edit the PO.

UPTAKE iMACS		demouser1 Demo																																																					
Quote Log		Project	Functions	Reports	Local Reports	Admin	Links																																																
Look For	Project Name	▼ that contains ▼		Search																																																			
Project: 151078	Project No: 151078 Project Name: CHOP Brandywine Valley SSC/ASC Stock No: M0262057							POLIST																																															
Stock: M0262057	<div style="display: flex; justify-content: space-between;"> Summary Budget WIP Costing PCR BOM RFQ PO Expediting Receiving PO Invoices </div>																																																						
Stock # Information	Purchase Order							Outstanding																																															
Project Team	<table border="1"> <thead> <tr> <th>PO #</th> <th>Revision</th> <th>Status</th> <th>Supplier</th> <th>Date Issued</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>A11078N001</td> <td>2</td> <td>Released For Prod</td> <td>MCS</td> <td>Jan 04, 2016</td> <td>28,090.00</td> </tr> <tr> <td>A11078N002</td> <td>3</td> <td>Released For Prod</td> <td>Power Systems</td> <td>Jan 04, 2016</td> <td>15,327.79</td> </tr> <tr> <td>A11078N003</td> <td>2</td> <td>Released For Prod</td> <td>ASCO</td> <td>Jan 09, 2016</td> <td>61,800.00</td> </tr> <tr> <td colspan="5" style="text-align: right;">Total Pending (including Freight):</td> <td>0.00</td> </tr> <tr> <td colspan="5" style="text-align: right;">Total Issued (including Freight):</td> <td>105,217.79</td> </tr> <tr> <td colspan="5" style="text-align: right;">Total Cancelled (including Freight):</td> <td>0.00</td> </tr> <tr> <td colspan="5" style="text-align: right;">Total Freight:</td> <td>0.00</td> </tr> </tbody> </table>							PO #	Revision	Status	Supplier	Date Issued	Total	A11078N001	2	Released For Prod	MCS	Jan 04, 2016	28,090.00	A11078N002	3	Released For Prod	Power Systems	Jan 04, 2016	15,327.79	A11078N003	2	Released For Prod	ASCO	Jan 09, 2016	61,800.00	Total Pending (including Freight):					0.00	Total Issued (including Freight):					105,217.79	Total Cancelled (including Freight):					0.00	Total Freight:					0.00
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External Services																																																							

Outstanding Items

A Purchase Order can be created if there are outstanding items. Outstanding items are items that have been released, but not purchased. Viewing outstanding items on a project class level will show all outstanding items for stock numbers owned by your company. To view outstanding items, click the Outstanding button in the top right corner.

To [create a RFQ](#) for any outstanding item, click New RFQ.

UPTAKE iMACS		demouser1 Demo																																																					
Quote Log		Project	Functions	Reports	Local Reports	Admin	Links																																																
Look For	Project Name	▼ that contains ▼		Search																																																			
Project: 151078	Project No: 151078 Project Name: CHOP Brandywine Valley SSC/ASC Stock No: M0262057							POLIST																																															
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External Services																																																							

To view the details of an item, click the View button. The Status of the item can be changed from Released back to Pending, which will allow the details of the item to be edited. After the information has been updated, the item will have to be Released again.

Outstanding Item	
Part #	45315
Part Name	adfadfddd
Manufacturer	A-1 Shipping
Status	Released
Quantity	Released
Date Required	Pending
Procurement Code	
Sug Supplier Part #	6554354
Supplier	ABLE PAINTING & CONTRACTING
Unit Cost	2.00
Created by Esther Petsinis on 6/6/2001 3:28:36 PM	
Updated by Esther Petsinis on 6/6/2001 3:28:40 PM	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Creating a Purchase Order

To create a PO, click the New PO button from the Outstanding Items screen. The supplier drop down box will list all the suppliers that the outstanding parts are available from. After you choose a supplier from the list, the outstanding parts will be listed at the bottom of the screen. If you are on project class level, it will list all outstanding items for stock numbers owned by your company, so you can create one purchase order for multiple stock numbers. Click the Search button, and the contacts for the chosen supplier will be displayed. Click the Add button next to the contact you want to send the PO to. Check off each outstanding item that you want included on the PO. Click the Save button after all the information has been entered.

Look for a project number that contains		Search
Project No: 010024 Project Information Customer Contacts Project Team Summary CAT Consist CAT Parts Equipment Engineering Production Field Service External Services New PCR New Stock #		
Summary Budget Costing PCR BOM RFQ PO Receiving PO Invoices		
New Purchase Order		
Supplier	ABLE PAINTING & CONTRACTING	
Contact First Name	<input type="text" value="Search"/>	Phone #
Contact Last Name		Fax #
PO Currency	CAD	Date Required Jul 16, 2001
Approved By		Date Approved Jul 16, 2001
Charge Code		
<input type="checkbox"/>	Manufacturer A-1 Shipping	Supplier Part # 6554354
	Part Name adfadfddd	Qty 3
		Unit Cost \$2.00
		Total: \$6.00
<input type="button" value="Save"/> <input type="button" value="Cancel"/>		

After the information has been saved, a PO number will be generated. A window will open where you can enter any delivery information.

The screenshot displays a software window for editing a Purchase Order (PO). The window title is "PO # : 010024P046".

Header Information:

- Freight: 0.00
- Approval Drawings Required:
- Date Approval Drawings Required: 17-Jul-01
- Comments: [Empty text area]

Delivery Information:

- FOB: Supplier
- Company Name: Power Systems
- Address: P.O. Box 5511 - 3131 Highway 7 West, Building A
- City: Concord
- Contact First Name: Building A - Receiving
- Province: ON
- Contact Last Name: [Empty text area]
- Postal Code: L4K 1B7
- Phone #: [Empty text area]
- Country: CA
- Comments: [Empty text area]

Buttons: Save, Cancel

Editing a Purchase Order

To edit the header information of a PO, click the Edit button. Click Save after all the information has been updated. To add a part to the PO, click the Add button. The window will show all outstanding parts that are available from this supplier. If you are on a project class level, it will show all outstanding items for stock numbers owned by your company. Click Add next to the part to add to the PO. The quantity and unit cost can be updated for each part. Click Save after the information is updated. The delivery information can be viewed or edited by clicking the More> button in the top right corner.

UPTAKE iMACS demouser1 Demo

Quote Log Project Functions Reports Local Reports Admin Links

Look For Project Name that contains Search

Project: 151078 Project Name: CHOP Brandywine Valley SSC/ASC Stock No: M0262057 POLIST

Stock: M0262057

Summary Budget WIP Costing PCR BOM RFQ PO Expediting Receiving PO Invoices

Revision3

PO # A11078N003 PO Currency USD

Supplier L0000005 - ASCO Approved By Demo user24

Revision No 3 Date Approved Jan 09, 2016

Status Pending Date Ordered May 01, 2016

Charge Code A11078 Hold For Approval YES

Tax Exempt YES

Electronic Files (File Type)

CAD Drawings

Contact First Name Jim Phone # 2121005781

Contact Last Name Noble Fax # 2121005713

Email bqmvtoj.fszqkmaf@zfgtwnc.kwtxhg.net

Created: Demo user1, Jun 24, 2019

Updated: Demo user1, Jun 24, 2019

Shipping Info

Manufacturer	Supplier Part #	Mnf Part #	Part Name	Part Description	Date Required	QTY	Unit Cost	
	Transfer Switches	Transfer Switches	Transfer Switch	Qty. (2) Bulletin 7000 Series Cat#: J7ATBA3400NSXC. Automatic Transfer	Apr 06, 2016	1	61,800.00	
							Freight	0.00
							Total	61,800.00

After the status has been changed to Issued, no changes can be made to the PO. Click the New Revision button to create the next revision, which will allow you to make changes to the PO. A drop down box in the top left corner shows you what revision you are currently looking at. You can view previous revisions of the PO by choosing the revision number. Only the current revision of the PO can be edited.

UPTAKE iMACS demouser1 Demo

Quote Log Project Functions Reports Local Reports Admin Links

Look For Project Name that contains Search

Project: 151078 Project Name: CHOP Brandywine Valley SSC/ASC Stock No: M0262057 POLIST

Stock: M0262057

Summary Budget WIP Costing PCR BOM RFQ PO Expediting Receiving PO Invoices

Revision4

PO # A11078N003 PO Currency USD

Supplier L0000005 - ASCO Approved By Demo user24

Revision No 4 Date Approved Jan 09, 2016

Status Issued Date Ordered Jun 24, 2019

Charge Code A11078 Hold For Approval YES

Tax Exempt YES

Electronic Files (File Type)

CAD Drawings

Contact First Name Jim Phone # 2121005781

Contact Last Name Noble Fax # 2121005713

Email bqmvtoj.fszqkmaf@zfgtwnc.kwtxhg.net

Created: Demo user1, Jun 24, 2019

Updated: Demo user1, Jun 24, 2019

New Revision

Shipping Info

Manufacturer	Supplier Part #	Mnf Part #	Part Name	Part Description	Date Required	QTY	Unit Cost
				Qty. (2) Bulletin 7000 Series Cat#: J7ATBA3400NSXC. Automatic Transfer Switch, Open transition, Power Indicator. Rel. 400 amp, approved to operate			

Printing a Purchase Order

The PO can only be printed when the status of the current revision is Issued. Click the Print button to view and print the PO.

Cat Consist Order

Overview

The CAT Consist Order applies only to the CAT Consist class on the stock level. The Order tab shows the current equipment order in DBS. The data is updated once a day from DBS.

UPTAKE iMACS		demouser1 Demo						
Quote Log		Project	Functions	Reports	Local Reports	Admin	Links	
Look For		Project Name	▼ that contains ▼		Search			
Project: 151078		Project No: 151078 Project Name: CHOP Brandywine Valley SSC/ASC Stock No: M0262057					Orders	
Stock: M0262057								
Stock # Information								
Project Team								
Summary								
CAT Consist								
CAT Parts								
Equipment								
Engineering								
Production								
Field Service								
External Services								
Reference	Description	Ordered	A/I	Unit Cost	Total Cost	Enter Date	Change Date	
4230922	CAPTIVE: 4230922-C15-CS667	1	I	0.00	0.00	May 12, 2015	May 13, 2015	
4226041	GENERAL AR	1	I	0.00	0.00	May 12, 2015	Jun 04, 2015	
LS1441	C15 ENGINE AR - STD	1	I	0.00	0.00	May 12, 2015	Jun 04, 2015	
4183863	GENERATOR AR-PWR	1	I	0.00	0.00	May 12, 2015	Jun 04, 2015	
LS1902	IBC CERTIFICATION LABELS - ENC	1	I	0.00	0.00	May 12, 2015	Jun 04, 2015	
LS1275	NORMAL CALBLE ENTRY PTS AND CB	1	I	0.00	0.00	May 12, 2015	Jun 04, 2015	
LS1332	POWER TERMINAL STRIPS	1	I	0.00	0.00	May 12, 2015	Jun 04, 2015	
LS1319	GEN MTG & DUCT PLATE	1	I	0.00	0.00	May 12, 2015	Jun 04, 2015	
LS1326	CURRENT TRANSFORMER	1	I	0.00	0.00	May 12, 2015	Jun 04, 2015	
4218926	KIT - LITERATURE	1	I	0.00	0.00	May 12, 2015	Jun 04, 2015	
LS1462	4 HOUR TEST	1	I	0.00	0.00	May 12, 2015	Jun 04, 2015	
LS1450	TEST - PKG GEN SET	1	I	0.00	0.00	May 12, 2015	Jun 04, 2015	
LS1454	JACKET WATER HEATER	1	I	0.00	0.00	May 12, 2015	Jun 04, 2015	

Cat Consist Order Board

Overview

The Order Board applies only to the CAT Consist class on the stock level. The original data source is the CAT Network. The data includes the engine model and serial number, as well as ESO and RTS date.

UPTAKE iMACS		demouser1 Demo						
Quote Log		Project	Functions	Reports	Local Reports	Admin	Links	
Look For		Project Name	▼ that contains ▼		Search			
Project: 151078		Project No: 151078 Project Name: CHOP Brandywine Valley SSC/ASC Stock No: M0262057					Order Board	
Stock: M0262057								
Stock # Information								
Project Team								
Summary								
CAT Consist								
CAT Parts								
Equipment								
Engineering								
Production								
Field Service								
External Services								
DBS Model and Serial Number								
Model	C15 PGAN							
Serial No	0QKN93489							
On Order Status								
ESO								
Serial No								
Model								
Top Level								
Arrangement								
Stage								
Ex-Factory Date								
RTS								
Revision Date								
BackOrder Date								

Receiving

Overview

Receiving functions are available for the CAT Consist, CAT Parts, Equipment, and External Services classes on a project and stock level. For CAT Parts, Equipment, and External Services, the Receiving tab defaults to a list of purchase orders that have been Issued. To view or receive items on a PO, click on the PO numbers. For CAT Consist, the Receiving tab defaults to the items on the [CAT Consist Order](#) tab.

The screenshot shows the 'Receiving' tab in the iMACS application. The interface includes a navigation menu on the left with categories like 'CAT Consist', 'CAT Parts', 'Equipment', etc. The main area displays a table of items with the following columns: Reference, Description, A/I, Ordered, Received, Outstanding, and Receive Selection. Each row has a checkbox and 'View' and 'Receive' buttons.

Reference	Description	A/I	Ordered	Received	Outstanding	Receive Selection
<input type="checkbox"/> C15DECC		1	1	0	1	<input type="button" value="View"/> <input type="button" value="Receive"/>
<input type="checkbox"/> ACLHD23	AIR CLEANER - HEAVY DUTY 23	1	1	0	1	<input type="button" value="View"/> <input type="button" value="Receive"/>
<input type="checkbox"/> OGNSEU4	LC61148 SE ALT U4	1	1	0	1	<input type="button" value="View"/> <input type="button" value="Receive"/>
<input type="checkbox"/> FULLPWR	FULL POWER	1	1	0	1	<input type="button" value="View"/> <input type="button" value="Receive"/>
<input type="checkbox"/> EMCLAM1	FIRST LOCAL ANNUNCIATOR	1	1	0	1	<input type="button" value="View"/> <input type="button" value="Receive"/>
<input type="checkbox"/> ANNR001		5	1	0	1	<input type="button" value="View"/> <input type="button" value="Receive"/>
<input type="checkbox"/> STDIVR	INTEGRATED VOLTAGE REGULATOR	1	1	0	1	<input type="button" value="View"/> <input type="button" value="Receive"/>
<input type="checkbox"/> MNTWB04	WIDE BASE W/ EXTENSION 04	1	1	0	1	<input type="button" value="View"/> <input type="button" value="Receive"/>
<input type="checkbox"/> BAT2440	STD BATTERY SET - INSTALLED	1	1	0	1	<input type="button" value="View"/> <input type="button" value="Receive"/>

Receiving Items

For CAT Parts, Equipment, and External Services, the items on the PO are divided into 2 sections - Outstanding Items and Received Items. For CAT Consist, all the items from the DBS order are listed, showing the quantity ordered, received, and outstanding. To receive an item, click the Receive button.

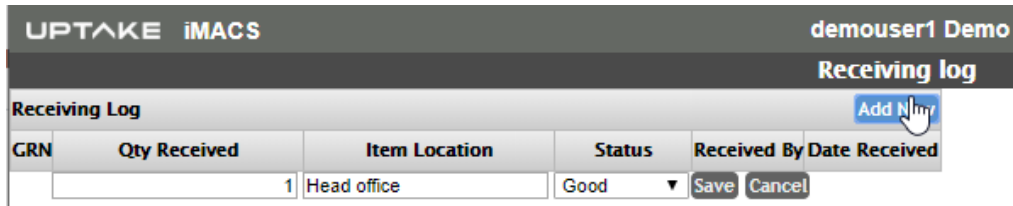
For CAT Consist, CAT Parts, and Equipment, enter the quantity received. The item location and status are optional. After you click the Save button, a GRN (Goods Received Number) will be generated.

The screenshot shows the 'Receiving Log' table with the following data:

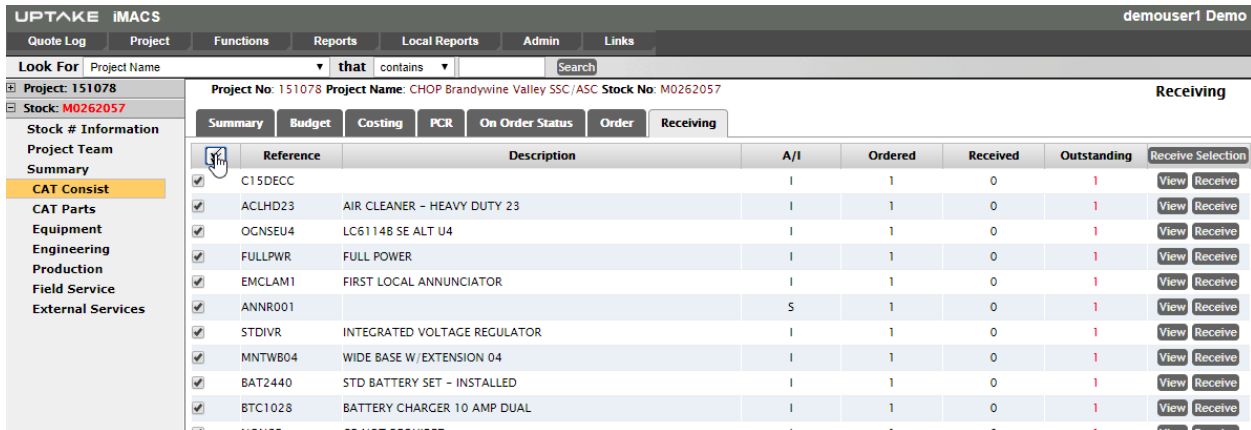
GRN	Qty Received	Item Location	Status	Received By	Date Received	Add New
010024PGRN0291	1	Shelf B		Esther Petsinis	17-Jul-01	<input type="button" value="Add New"/>

Below the table are input fields for GRN, Qty Received, Item Location, and Status, along with 'Save' and 'Cancel' buttons.

For External Services, enter the quantity completed and the date completed, and click the Save button.

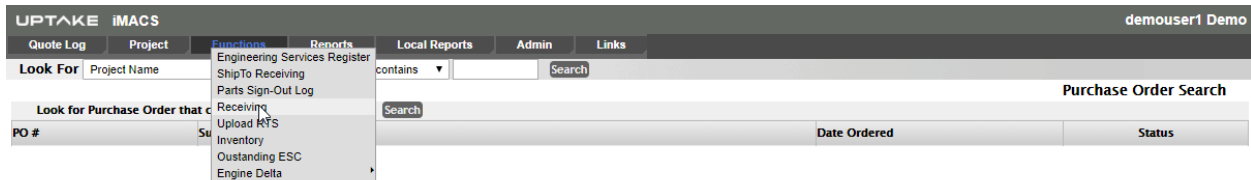


For CAT Consist, you can receive all installed items (items where the A/I - Assembly Indicator is I) at once. Click the Receive button in the top right corner.

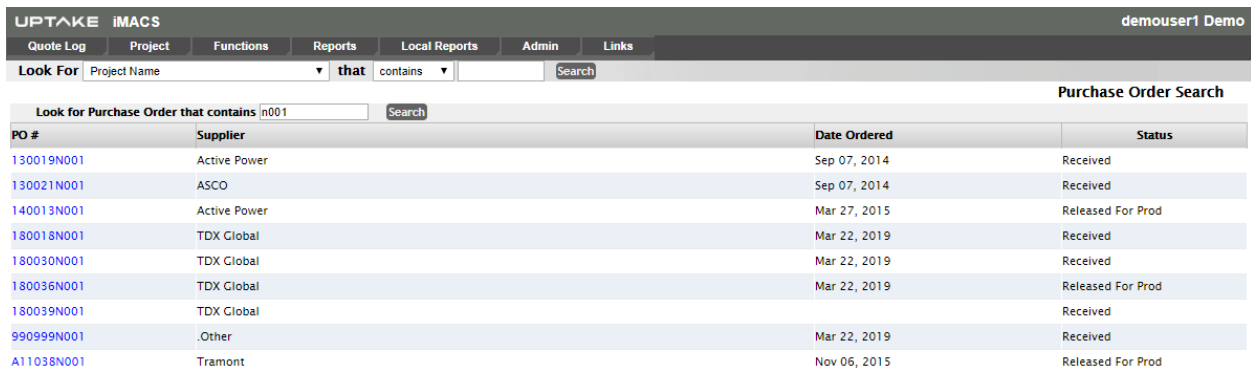


Global Receiving

The Global Receiving function is a way to receive items without going in and out of each project and stock number.



You can search for a PO by entering a keyword and clicking Search. A list of purchase orders containing the keyword will be shown. Click on a PO number to view and receive items.



You can receive items as described in the Receiving Items section above. The purchase order search bar will always be shown at the top so you can search for another PO easily.

Shipping

Overview

The shipping functions are a way to track equipment that is shipped out to customer sites. These functions are available on the stock summary level. The shipping tab defaults to a list of component locations.

Component Locations

A component location is a description of something that will be shipped to the customer. It can be made up of one or many parts. Each part added to the bill of materials is associated with a component location. When a stock number is created, default component locations are added depending on the stock type. The Shipped Loose component location is added by default for all stock types. If the stock type is Engine, an Engine component location is added, and if the stock type is Engine with Control Panel, or Gen-Set, the Engine and Control Panel component locations are added. Any component locations added by default when the stock number is created cannot be deleted.

To add a component location, click the Add New button. Enter the component location, and click Save. To edit an existing component location, click the Edit button, then Save after the information has been updated. To delete a component location, click the Delete button. You cannot delete a component location if any parts on the bill of materials has been associated with it.

The screenshot displays the UPTAKE iMACS software interface. At the top, there is a navigation bar with tabs for Quote Log, Project, Functions, Reports, Local Reports, Admin, and Links. Below this is a search bar with the text "Look For Project Name" and a dropdown menu set to "that contains". The main content area shows a project summary for Project No. 190160 and Stock No. N7397. The "Shipping" tab is selected, showing a list of component locations. The list includes: Electrical, Mechanical, Other, Air intake system, Lubrication system, starting system, charging system, pump, skid base, instrumentation, automatic transfer switch, and uninterrupted power supply. A sidebar on the left contains a tree view with categories like Stock # Information, Project Team, Summary, CAT Consist, CAT Parts, Equipment, Engineering, Production, Field Service, and External Services.

Adding a Shipment

To add a new shipment, click the View Shipments button in the top right section then Add Shipment. Enter the FOB, Date Shipped, Shipped Via, and Comments fields. Click the Search button, and click Add next to the shipping address to use. Check off the parts that will be included in the shipment. You can also enter a Skid, Carton, or Box. Click the Save button after all the information has been entered.

The screenshot displays the 'New Shipment' form in the iMACS application. The interface includes a navigation menu on the left with options like 'Summary', 'CAT Consist', 'CAT Parts', 'Equipment', 'Engineering', 'Production', 'Field Service', and 'External Services'. The main form area contains the following fields and sections:

- Project Information:** Project No: 190160, Project Name: Test for automation with stock, Stock No: N7397.
- Navigation Tabs:** Summary, Budget, Costing, PCR, BOM, PO, Deficiencies, Shipping, Manual Invoices, Accounts Receivable, Commission.
- New Shipment Form:**
 - FOB: Customer Pick Up
 - Date Shipped: Jun 24, 2019
 - Shipped Via: (empty field)
 - Comments: (empty text area)
- Shipping Address Section:**
 - Company Name: AAD CONSTRUCTION INC
 - Address: 902 South Green Clarendon Road
 - City: on, State: (empty), Country: (empty)
 - Contact Name: on, Phone #: on
- Item List Table:**

Stock No	Comp Loc	PO #	Part #	Description	Rec'd	B/O	Skid	BOX
<input checked="" type="checkbox"/>								

Editing a Shipment

The shipment information can be edited when the status is Pending. Once the status is changed to Shipped, no changes can be made. You can edit the header information by click Edit, then Save after the information has been updated. To remove an item from the shipment, uncheck the checkbox next to the item. To add items to the shipment, click the Add button. Check off the items you want to add, and click the Add button.

Shipping Details

Project No: 190160 Project Name: Test for automation with stock Stock No: N7397

Status: Pending

FOB: Customer Pick Up

Date Shipped: Jun 24, 2019

Shipped Via:

Company Name: AAD CONSTRUCTION INC

Address: 902 South Green Clarendon Road

City: on State: on

Zip Code: on Country: on Phone #: on

Engines: Unit#: Manual:

S/N Attachments: Trailer Plate No: Parts:

Panels: Keys#: Operation:

Radiators: Battery Charger: Skids:

Battery: Other:

Created: Demo user1, Jun 24, 2019

Updated: Demo user1, Jun 24, 2019

Stock No	Comp Loc	PO #	Part #	Description	Shipped	Skid	BOX
<input checked="" type="checkbox"/>	Stock No	Comp Loc	PO #	Part #	Description		B/O

PO Invoices

Overview

The PO Invoices functions apply to the Equipment and External Service classes only. It is a way to track invoices received for purchase orders issued to external suppliers. The PO Invoices tab defaults to a list of purchase orders that have been partially or fully received. Click on a PO number to view the invoices or non-invoiced items.

The top section shows summary information for the purchase order. The second section lists any invoices already entered for this purchase order. The third section lists any received items that have not been invoiced yet.

Look for: a customer name that contains Search

Project No: 010024

Project Information
Customer Contacts
Project Team
Summary
CAT Consist
CAT Parts
Equipment
Engineering
Production
Field Service
External Services
New PCR
New Stock #

Stock No: P010024A
Stock # Information
Project Team

Purchase Order

PO #: 010024P004 PO Currency: CAD
Supplier: SLEX INC. Status: Received

Invoice #	Invoice Date	Invoice Amount	Comments
12345	12-Jul-01	250.00	
Total 250.00			

Non-Invoiced Received Items

GRN	Part #	Part Name	Received	Unit Cost	Total
010024PGRN0004	JDD5-SI-8	Exhaust Silencer hospital grade	1	1,159.50	1,159.50
010024PGRN0006	AC-GS-008	Gasket for 8 inch ANSI Flange	1	12.00	12.00
2 outstanding items					

Adding an Invoice

To add an invoice, click the Add New button in the second section. Enter the invoice number, date, amount, and comments. Check off which items are listed on the invoice, and click the Save button.

The screenshot shows the iMACS interface for adding a new manual invoice. The top navigation bar includes 'UPTAKE iMACS' and 'demouser1 Demo'. Below the navigation bar, there are tabs for 'Quote Log', 'Project', 'Functions', 'Reports', 'Local Reports', 'Admin', and 'Links'. A search bar is present with the text 'that contains'. The main content area is titled 'Manual Invoices' and includes a table with columns: Item No, Unit No, QTY, Qty Desc, Description, and Unit Price. An 'Add New' button is located at the bottom right of the table. The left sidebar contains a tree view with 'Summary' selected, and other options like 'CAT Consist', 'CAT Parts', 'Equipment', 'Engineering', 'Production', 'Field Service', and 'External Services'. The top right of the main area has buttons for 'Add New', 'Total', 'Save', and 'Cancel'.

Editing and Deleting Invoices

To edit an existing invoice, click the View button on the main screen. To edit the header information, click the Edit button. Click Save after all the information has been updated.

To delete an invoice, click the Delete button on the main screen.

The screenshot shows the iMACS interface for editing an existing manual invoice. The top navigation bar is the same as in the previous screenshot. The main content area is titled 'Manual Invoices' and includes a table with columns: Item No, Unit No, QTY, Qty Desc, Description, Unit Price, and Ext Price. The 'Edit', 'Delete', and 'Print' buttons are visible at the top right of the table. The left sidebar contains a tree view with 'Summary' selected. The top right of the main area has buttons for 'Add New', 'Edit', 'Delete', and 'Print'. The main area displays the following information:

Project No:	190160	Project Name:	Test for automation with stock	Stock No:	N7397
PO#/Date:	123012	Invoice No/GP%:	123456		
Customer Contact:	Trina Tucker (1652198 - IDD EXCAVATING & UNDERGROUND)				
Sales Contact:	Demo user1			TAX1 Amount:	150.00
Terms of Payment:	10 Days			TAX2 Amount:	200.00

The bottom of the table shows a 'Total' row with a value of 0.00.

Adding and Deleting Items

To add items to an existing invoice, click the View button on the main screen, then click the Add button. The pop-up window will display any items that haven't been invoiced. Check off the items you want to add to the invoice, and click Save.

Non-Invoiced Received Items						
Include	GRN	Part #	Part Name	Received	Unit Cost	Total
<input type="checkbox"/>	010024PGRN0288	153135	Allen Bradley Test Part 3	1	25.00	25.00
<input type="checkbox"/>	010024PGRN0289	153135	Allen Bradley Test Part 3	1	25.00	25.00

Save

To delete an item from an invoice, click the View button on the main screen, then click Delete next to the item to remove.

Deficiencies

Overview

Deficiencies is only available on the stock summary level. The Deficiencies function is a way to log any problems that are found, and how the problem was solved.

Creating a Deficiency

To log a deficiency, click the Add New button. You must enter a description. The Date Corrected and Comments can be entered when the deficiency is created, or later on by someone else. After the Save button is clicked, a deficiency number is generated automatically.

The screenshot shows the iMACS software interface. At the top, there is a navigation bar with tabs for Quote Log, Project, Functions, Reports, Local Reports, Admin, and Links. Below this is a search bar with the text "Look For Project Name" and a dropdown menu set to "that" with a "contains" filter and a "Search" button. The main content area displays "Project No: 190160" and "Project Name: Test for automation with stock Stock No: N7397". A sidebar on the left lists various categories: Stock # Information, Project Team, Summary (highlighted), CAT Consist, CAT Parts, Equipment, Engineering, Production, Field Service, and External Services. The main area has a "Deficiencies" tab selected, with other tabs like Summary, Budget, Costing, PCR, BOM, PO, Shipping, Manual Invoices, Accounts Receivable, and Commission. The "Deficiencies" section is currently empty, with a mouse cursor visible.

Editing a Deficiency

A deficiency can be updated if the Date Corrected has not been entered. No changes can be made after the Date Corrected has been updated.

Project Change Requests

Overview

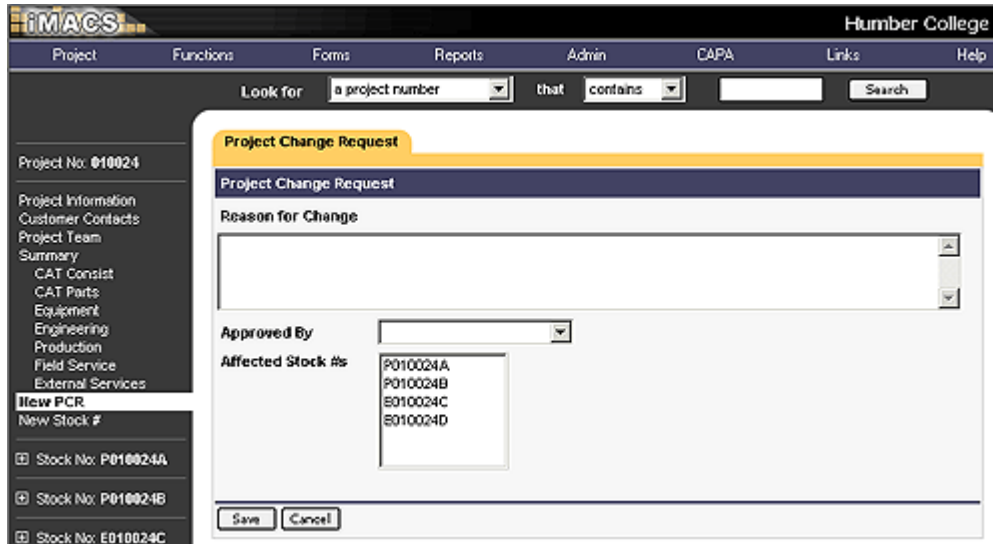
A Project Change Request is any change to the budget or delivery dates that is done after the initial information is entered and the stock status is changed to In Progress. Project Change Requests can be view on the Project summary or class level, and the stock summary or class level. The PCR tab defaults to a list of Project Change Requests that affected the current stock and/or class.

Creating a Project Change Request

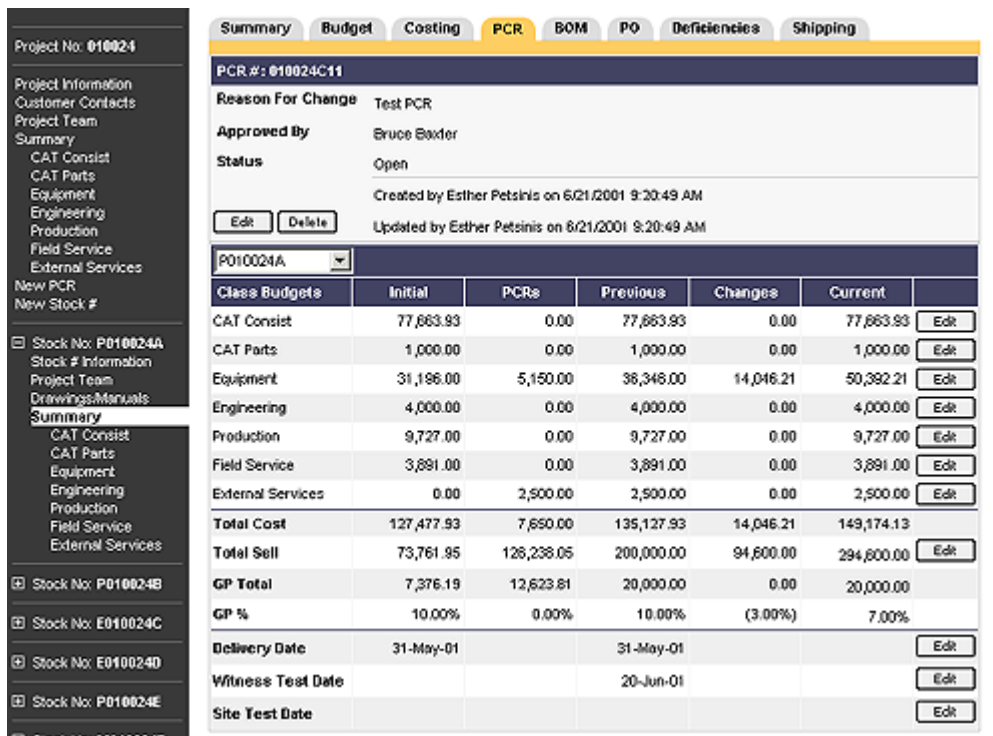
To create a Project Change Request, click New PCR on the left menu on the project level. You cannot create a new Project Change Request if one is already open. You can click on the PCR number link to view the open Project Change Request.

If no other Project Change Request is open, you can fill out the Reason for Change and Approved By information. The Affected Stock #s list box will show any In Progress stock

numbers in the current project for your company. You must choose at least one stock number that the Project Change Request will affect. To choose more than one stock number, hold the shift key down, and click the stock numbers.



After all the information has been entered, click the Save button. The system will generate a PCR number.



Editing a Project Change Request

Choose a stock number from the drop-down box under the header information. To edit a class budget, click the Edit button next to the Class. The current budget is shown in the pop-up

window. You can add, edit, and delete budget items. After the information has been saved, all information that was changed will be green.

Current Equipment Budget							
Reference	Description	Qty	Unit Cost	Freight	Reason	Total	Add New
3408HS	8	1	1600	50		2,430.45	Delete
962600	ATS/962/600A/600V	1	22256	0		32,783.09	Delete
COMMIASCO	COMMISS.	1	1540	0		2,268.42	Delete
DRP3406	DRIPTRAY 36	1	130	200	Customer Request	486.09	Delete
EL150-K1	MURPHY COOLANT LEVEL SWITCH	1	130	0		191.49	Delete

Current Equipment Budget							
Reference	Description	Qty	Unit Cost	Freight	Reason	Total	Add New
3408HS	8	2	1,600.00	50.00		4,850.90	Delete
962600	ATS/962/600A/600V	1	22,256.00	0.00		32,783.09	Delete
COMMIASCO	COMMISS	1	1,540.00	0.00		2,268.42	Delete
DRP3406	DRIPTRAY 36	1	130.00	200.00	Customer Request	486.09	Delete
EL150-K1	MURPHY COOLANT LEVEL SWITCH	1	130.00	0.00		191.49	Delete

To change the Sell Price, GP Total, or GP Percent, click the Edit button on the Total Sell line. If the Sell Price or GP Total is changed, the GP Percent will be updated. If the GP Percent is changed, the GP Total will be updated. Click the Save button after the information has been updated.

P010024A						
Class Budgets	Initial	PCRs	Previous	Changes	Current	
CAT Consist	77,663.93	0.00	77,663.93	0.00	77,663.93	Edit
CAT Parts	1,000.00	0.00	1,000.00	0.00	1,000.00	Edit
Equipment	31,196.00	5,150.00	36,346.00	17,546.21	53,892.21	Edit
Engineering	4,000.00	0.00	4,000.00	0.00	4,000.00	Edit
Production	9,727.00	0.00	9,727.00	0.00	9,727.00	Edit
Field Service	3,891.00	0.00	3,891.00	0.00	3,891.00	Edit
External Services	0.00	2,500.00	2,500.00	0.00	2,500.00	Edit
Total Cost	127,477.93	7,650.00	135,127.93	17,546.21	152,674.13	
Total Sell	73,761.95	126,238.05	200,000.00	94,600.00	294,600.00	Save
GP Total	7,376.19	12,623.81	20,000.00	0.00	20,000.00	
GP %	10.00%	0.00%	10.00%	(3.00%)	7	
Delivery Date	31-May-01		31-May-01			Edit
Witness Test Date			20-Jun-01			Edit
Site Test Date						Edit

Printing a Project Change Request

To print a Project Change Request, the status must be closed. Click the print button to view and print the Project Change Request.

Costing

Overview

Costing is available for the stock summary and all classes on the stock level. Data is updated once a day from DBS. Transactions are grouped by categories determined by the invoice number, entry code, and transaction code.

The screenshot shows the iMACS interface for the Costing module. The top navigation bar includes 'UPTAKE iMACS' and 'demouser1 Demo'. Below the navigation bar, there are tabs for 'Quote Log', 'Project', 'Functions', 'Reports', 'Local Reports', 'Admin', and 'Links'. A search bar is present with the text 'that contains'. The main content area displays a table of 'Partial Billings (rental)' with columns for Category, Class, Description, Amount, Cost, Invoice, Date, Entry Code, Code, and Source. The table lists several entries for 'HEAVEN' and 'BASF CORP' with various amounts and invoice numbers.

Category	Class	Description	Amount	Cost	Invoice	Date	Entry Code	Code	Source
Partial Billings (rental)		HEAVEN	75.00		I6855551	Mar 22, 2019	41N13	R	DBS
Partial Billings (rental)		HEAVEN	(75.00)		I3635528	Mar 22, 2019	41N13	R	DBS
Partial Billings (rental)		HEAVEN	0.00		I2496168	Mar 22, 2019	41N13	R	DBS
Partial Billings (rental)		BASF CORP	1,050.00		I0144692	Mar 22, 2019	41N13	R	DBS
Partial Billings (rental)		RE-RENTS	200.00		I4549581	Mar 22, 2019	41N13	R	DBS

Engineering Services Register

The screenshot shows the iMACS interface for the Engineering Services Register module. The top navigation bar includes 'UPTAKE iMACS' and 'demouser1 Demo'. Below the navigation bar, there are tabs for 'Quote Log', 'Project', 'Functions', 'Reports', 'Local Reports', 'Admin', and 'Links'. A search bar is present with the text 'that contains'. The main content area displays a table with columns for 'Category', 'Class', 'Description', 'Amount', 'Cost', 'Invoice', 'Date', 'Entry Code', 'Code', and 'Source'.

Overview

The Engineering Services Register is a way to log employee time and expenses against a stock number and/or service segment. To view previous entries, click on the date you want to view from the calendar.

You can view entries for the current project from the Engineering Services Register tab in the Engineering class on the project and stock levels.

Creating an Entry

To add an entry, click the Add New button. If the Service Segment is Sales or Product Support, a stock number does not need to be chosen, otherwise the stock number is required.

The screenshot displays the 'Engineering Services Register' interface. At the top, there is a navigation bar with 'UPTAKE iMACS' and 'demouser1 Demo'. Below this is a search bar with 'Project Name' and 'that contains' filters. The main area shows a table with columns: 'Service Segment', 'Reference', 'Hours', and 'Comments'. A date picker is open, showing the month of June 2019 with the 24th selected. The table has a 'Save' and 'Cancel' button at the bottom right.

Editing an Entry

To edit an entry, click the Edit button. After updating the information, click the Save button.

Deleting an Entry

To delete an entry, click the Delete button.