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  
*iQuote*

**USER GUIDE**  
Updated June 12, 2019

**UPTAKE**

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## DISCLAIMER

We update iQuote 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 This user guide will be updated on an ongoing basis and may have slightly outdated content due to the frequency of software updates.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 iQuote application with the assumption that your dealership has made the migration to CloudLink and your iQuote application has been set up in a standard configuration. However, it should be noted that depending on your dealership's level of customization, or if your dealership hasn't migrated to CloudLink yet, your screens may look slightly different than those shown here.

# INTRODUCTION

Welcome to iQuote. This user-friendly application allows you to produce a professional quality machine or attachment quote document for presentation to a customer. To access the application, log in to CloudLink with your Username and Password, then click the [ENTER] button under **iQuote**. You will be taken to the iQuote Home page.

The screenshot shows the iQuote application interface. At the top, there are navigation tabs for 'Quotes', 'Standard Packages', 'BHL', 'TH', 'CCE', 'TTT', 'WL', 'TTL', 'HEX', 'MG', 'TRK', 'WTS', '800', 'WT', 'MC&G', 'SCOM', 'ACOM', 'UCOM', 'LAP', 'PAV', 'FRSTR', 'USDNC', 'NONCU', 'Admin', and 'Links'. Below this is a search bar with 'Look for' and 'Quotes' selected, and a 'Home: Quotes' link. The main area contains various filters for 'Owner', 'Source', 'Eq. Status', 'DBS Eq. Status', 'DBS Inv. Status', 'Opportunity Type', 'Quote Type', 'Status', 'Current', 'History', 'Probability of Closing', 'Customer Type', and 'Opp Product'. Below the filters is a table with columns: User Name, Quote No, Quote Type, Opp. Type, Prod., Cust. Number, Cust. Name, Cust. Type, Sales Rep, Configuration Name, Eq. Status, Source, Type, Stock #, DBS Eq. Status, DBS Inv. Status, Model, MK, Quote Status, Prob. Closing, Age, GP%, and Sell.

User Name	Quote No	Quote Type	Opp. Type	Prod.	Cust. Number	Cust. Name	Cust. Type	Sales Rep	Configuration Name	Eq. Status	Source	Type	Stock #	DBS Eq. Status	DBS Inv. Status	Model	MK	Quote Status	Prob. Closing	Age	GP%	Sell
courtme Demo	125002	Opp	Sales	Primary	1635105	DEM EXCAVATING & UNDERGROUND	Prv	G Acosta, Rafael	D6T-D6L XT TRACTOR DCA1	N	Price List	Machine		N/A	N/A	D6T	AA	Won	Medium	-255	10.1	406,780
courtme Demo	124998	Opp	Sales	Primary	1635105	DEM EXCAVATING & UNDERGROUND	Prv	G Black, Royce	430FIT CAB/AC/AS/RC/4WD/COMBO	N	Price List	Machine		N/A	N/A	430F	AA	Won	Medium	-238	8.1	133,900
jmayher Demo	124993	Opp	Sales	Primary	1676457	ZWG EXCAVATING & UNDERGROUND	Prv	G Acosta, Rafael	336F-336F L HEX AM-N DCA1A	N	Price List	Machine		N/A	N/A	336F	AA	Lost	Low	-227	9.8	349,525
elaine.pizzatti Demo	124988	Opp	Sales	Primary	1697475	DAN EXCAVATING & UNDERGROUND	Prv	G Demo, demouser1	D5K2XL ATHENS/CAB/AC/ARO	N	Price List	Machine		N/A	N/A	D5K2 HRC	AA	In Progress	Medium	-220	8.5	146,630
demouser1 Demo	124979	Opp	Sales	Primary	1652198	IDD EXCAVATING & UNDERGROUND	Corp	G Acosta, Rafael	420F2IT - M0813669	N	Inventory	Machine	M0813669	N	N/A	420F2IT	AA	Won	Medium	-214	.1	143,546
jmayher Demo	124991	Opp	Sales	Primary	\$019150	Customer ABC	Prv	G Cole, Erik	D5K2 HRC-D5K2 XL TRACTOR	N	Price List	Machine		N/A	N/A	D5K2 HRC	AA	In Progress	Low	-220	9.9	125,171
hamerd Demo	124981	Opp	Sales	Primary	1697475	DAN EXCAVATING & UNDERGROUND	Prv	G Demo, demouser1	12M3 ARO/PL/RIPP-SCAR	N	Price List	Machine		N/A	N/A	12M3 BR	AA	In Progress	Medium	-213	8.6	341,000
hamerd Demo	124980	Opp	Sales	Primary	1697475	DAN EXCAVATING & UNDERGROUND	Prv	G Demo, demouser2	12M3 AWD	N	Price List	Machine		N/A	N/A	12M3AWDBR	AA	In Progress	Medium	-213	8.4	384,000

## Overview

### Standard Packages

iQuote is connected to the DBS price list for standard packages from CAT MAs or dealer-specific ordering packages. This list is updated daily. Each package for each model is built starting with the standard MA arrangement and can be customized for the way it is sold at your dealership.

### Attachments

Attachments are also connected to the DBS price list. When adding them to a standard package, there is a list of **Mandatory** attachments and **Optional** Attachments.

### CAT Claim Programs

These are maintained in a table which contains all the details for these programs as listed in CSS. This table contains the program pricing, details as to its specific prerequisites for connection to a deal, and allows for multiple programs to be added.

## Warranties

These are maintained in a table which contains all of the different warranties available for the specific model, as well as the pricing for each.

## Trade-ins

For the purposes of incorporating the value of the trade into the quote and, should the deal be approved, pushing the details of over-allowances, outstanding balances of existing financing, and payout details to the Sales Agreement document.

## Sales Agreement

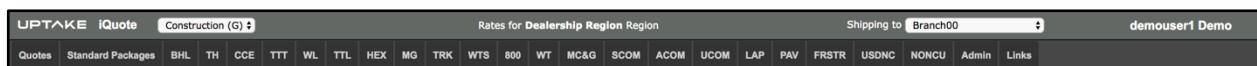
All of the details from the quote submitted to the customer transfer directly to a PDF or Microsoft Word document version of the company sales agreement that contains the legal details normally printed with and signed off on by the customer.

## Deal Workflow Facilitation

Once the customer has agreed to purchase and the agreement details have been entered into iQuote, the status of the deal can be set to Won, Lost, or No Deal. Each has its own subsequent workflow to enter information required by the dealer process, i.e. Lost Sales detail, Competitive Price information, etc. that saves the sales rep from having to submit that information manually or repetitively.

## Navigation

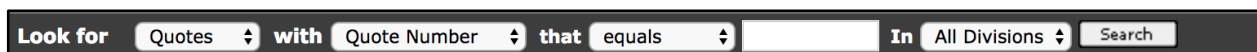
### Navigation Bar



The Navigation Bar is located at the top of the screen and includes quote workflow, standard packages, model lines, administration, and links. The Navigation Bar can be accessed from anywhere in iQuote.

### Quote Search Bar

A search can be done for an existing quote based on Quote Number, Business Name, Customer Number, Serial Number, or Stock Number for both equipment and attachments.



## Print

To print what is shown on the screen, click the print icon at the top right of the page.



## Quote Search Filter

The Quote Search Filter helps you filter the total list of all quotes down to just the quote(s) you're looking for. Admins can search for a quote developed by anyone. The sales reps can only search for quotes assigned to or shared with them.

The screenshot shows a complex search filter interface with the following fields:

- Owner:** All
- Family:** All
- Base Model:** All
- Sales Rep:** All
- Sales Manager:** All
- Source:** All
- Eq. Type:** All
- Last Changed:** Within Three Months
- Division:** Construction
- Shipping To:** All
- Eq. Status:** All
- DBS Eq. Status:** All
- DBS Inv. Status:** All
- Opportunity Type:** Sales
- Quote Type:**  Opportunity  Budgetary
- Status:**  All  Current  In Progress  Submitted  Won  Lost  No Deal
- Probability of Closing:**  Low  Medium  High
- Customer Type:**  Corporate  Governmental  Private
- Opp Product:**  Primary  Alternate
- Public:** Show
- Estimate Delivery From:** To:
- Filter** and **Set as Default** buttons.

## Selecting a Model

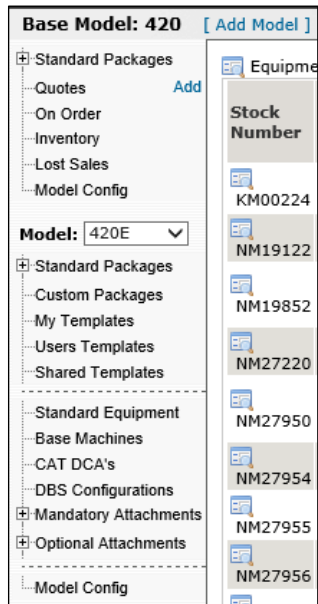
In the top Navigation Bar, hover over the product family you want to quote on and then click on the base model. This will bring up a page showing all new, rental, and used machines that are in inventory or on order for that specific base model.

The screenshot shows the UPTAKE iQuote interface with the following details:

- Navigation Bar:** UPTAKE iQuote, Construction (G), Rates for Dealership Region Region, Shipping to Branch00, demouser1 Demo
- Look for:** Quotes with Quote Number
- Base Model:** D3
- Inventory - Base Model Table:**

Stock Number	Serial Number	Medium Dozers	ADG Inventory	Description & Condition	Comments	Availability	Open W/O	Quotes	Book Value	Asking Price	Reservation
M8449088	0YDX45538	D6N	19 G R01	D3K2LGP NO FOCUS SEE MGR ATHENS CAB/AC/ARO/SLPE FOR R/F 2016	LEASE 1 MONTH				73,070.72	73,070.72	99,000.00

## Model Menu



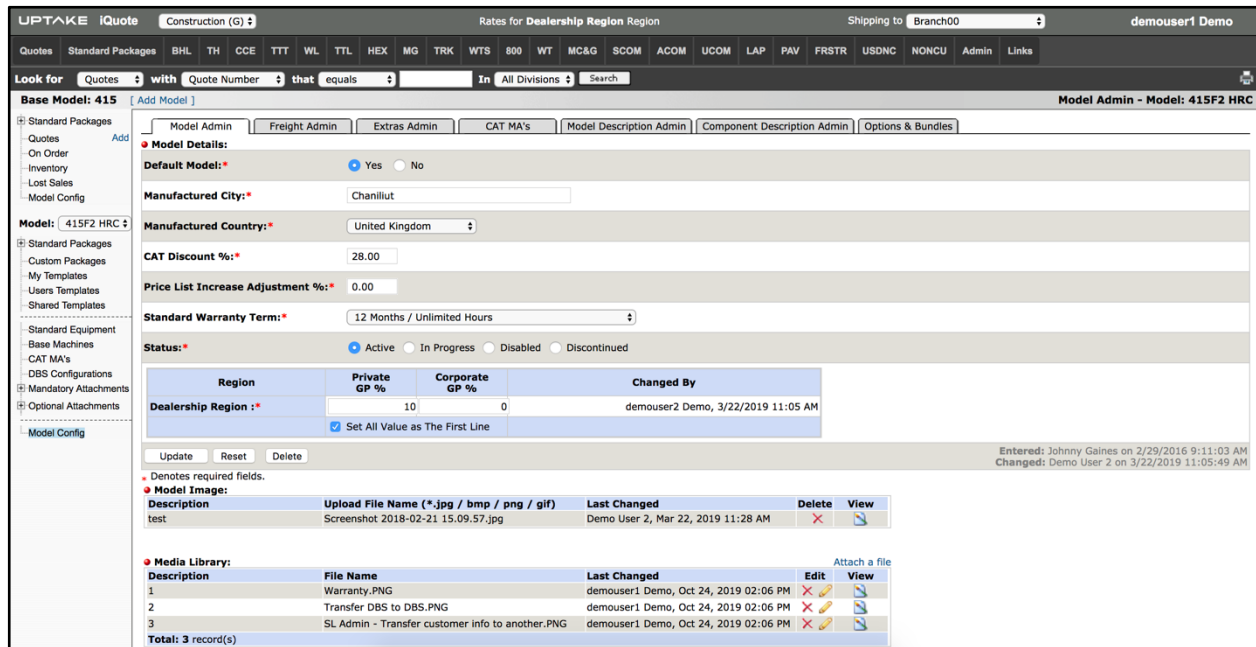
The Model Menu is available when you are working from a Product home page.

A drop-down list allows you to drill down to a specific MA or standard package. Everything displayed in the model menu is specific to the model shown in the hierarchy.

## Model Config

Users with Admin access to iQuote responsible for the model configurations will see the **Model Config** link at the bottom of the left menu on each model page. Clicking the link will display the following configurable items:

- Model Admin: set highlighted model as default and general model info
- Freight Admin: set the freight amounts from each branch
- Extras Admin: select which extra and its cost to display on each quote by default
- CAT MA's Admin: modify the description for the MA to make it dealer specific
- Model Description Admin: change the description of the standard features of the model
- Component Description Admin: select which CAT price list items to hide or change the description; if updated, it will affect all quotes with In Progress status
- Options & Bundles Admin: dealers can create bundles or specify options that can be added to the quote



These Admin pages are also available on Base Model, Family, and Area levels. This allows users to set up model information from a higher level.

- Changes made on Base Model will apply to all Models of the Base Model.
- Changes made on Family will apply to all Base Models and Models of the Family.
- Changes made on Area will apply to all Families, Base Models, and Models of this Area.

**NOTE:** The Base Machines, CAT MA's, and DBS Configuration Admin pages will only be visible on Model level.

### Media Library

The Media Library allows users to attach images or documents to the quote. You can attach an unlimited number of media files at the Area, Family, Base Model, and Model Levels. These media items will be added on the quote when the quote is created and listed under the Documents tab.

**NOTE:** This functionality can also be used to store PDF, xls, PPT, .doc files as a reference library.

### Options & Bundles

An Option is an item which users can add to a quote that would not be included in the base configuration. A Bundle is a group of options that the user can add.

Add Bundle:

1. Click the **Add Bundles** link. The Bundle window displays.

2. On the Settings, set up a Description and a target GP% user for the bundle item(s).
3. The Components tab shows the available configurations for the quote and also the ability to add more or update/remove the existing configuration. Add/Edit the configurations as needed.

## EQUIPMENT RELATED TASKS

Click the Equipment Related Tasks icon next to the stock number of a piece of equipment to perform the following tasks.

### Reservation Request

Click **[Request Reservation]** to request a reservation for the machine selected on the inventory. Enter all required fields and then click **[Send Request]**.

The email is sent to the users set up to receive the Reservation Request on the Admin module **Manage Users for Reservation Request** and also for the sales rep selected on the Reservation Request page.

### Work Orders

Click **[Work Orders]** to view a list of all work orders related to the equipment from a segment or invoice view.

### Warranty

Click **[Warranty]** to display a list of all warranties that were purchased for the equipment.

### Equipment Configuration

Click **[Equipment Configuration]** to display a read-only view of the DBS configuration for the equipment including attachments attached to the serial number.

### Transaction Register

Click **[Transaction Register]** to display a complete summary of all the transactions charged or credited to the serial number in DBS, including work orders.

# CREATING A NEW QUOTE

A quote can be started from a number of different places in the application:

- The **Add** link in the left menu
- Standard Packages
- Standard Equipment
- Inventory
- On Order
- Base Machine
- Templates (My, users and shared)
- From a previously created quote

## Quote Types

There are two types of quotes: Budgetary and Opportunity.

Budgetary quotes are “what-if” quotes when sales reps need an estimate that will never be presented to a customer and will not create an opportunity in SalesLink. If the sales rep wishes to convert a budgetary quote a customer quote, they can copy that budgetary quote to an opportunity quote type. This provides management with the visibility of the sale in the opportunity reports in SalesLink.

**NOTE:** Sales agreements and quote documents cannot be created from a budgetary quote.

## Methods for Starting a Quote

### Add Link (Left menu)

The **[Add]** button to the right of the Quotes line in the Left menu allows all of the machine-related information to be carried directly to the quote to begin the customization process.

#### Base Machines:

Some quotes that are for custom machines not built off a price list or DCA configuration will begin from the base machine page. For example, a hydraulic excavator that is going to be used for a specific application that requires special boom, lines, and stick combinations.

#### CAT MA's:

Beginning a quote from the MA menu allows the sales rep developing the quote to choose from a list of machines as they would be ordered from the factory if an inventory or on-order unit is not suitable for the customer's purposes.

### DBS Configurations:

Some dealers use DBS Configurations instead of Standard Packages or quoting from Inventory or On-Order. If that process is in place at your dealership, these configurations will be visible on this page.

### Standard Packages (Left and Top menu):

Click on the **Standard Package** link in the top navigation bar and then select **Public View**. Models in each subsequent category are listed across the top of the Models Menu.

UPTAKE iQuote		Rates for Dealership Region Region															Shipping to Branch00		demouser1 Demo	
Look for		Quotes with Quote Number that equals In All Divisions Search																		
<b>Standard Packages (Public View) - Base Model</b>																				
<b>&gt; AccuGrade</b>		<b>Model</b>	<b>Package No.</b>	<b>Package Name</b>	<b>Warranty</b>	<b>Retail Price (Inc Warranty)</b>	<b>Factory Code</b>													
<b>MG</b>		ACCU MG1	ATS-MMG-1	M Series ATSCrossSlope	0	5,800	2.40E-01	<a href="#">Create Quote</a>												
			CS-MMG-1	M Series Cross Slope Only	0	9,533	2.40E-01	<a href="#">Create Quote</a>												
			GPS-MMG-1	M Series DualGPSCrossSlope	0	5,800	2.40E-01	<a href="#">Create Quote</a>												
			LSR-MMG-1	M Series DualLaserCrossSlope	0	4,867	2.40E-01	<a href="#">Create Quote</a>												
<b>OFFICE</b>		ACCU OFC	ACOF-1	ACCUGRADE OFFICE SOFTWARE	0	133	2.40E-01	<a href="#">Create Quote</a>												
<b>TTT</b>		ACCU TTT1	GPS-TTT-1	AccuGrade GPS for G & N Series	0	4,867	2.40E-01	<a href="#">Create Quote</a>												
			GPS-TTT-2	AccuGrade GPS for K&T Series	0	9,533	2.40E-01	<a href="#">Create Quote</a>												
			LSR-TTT-1	AccuGrade Laser for G Series	0	4,867	2.40E-01	<a href="#">Create Quote</a>												
<b>&gt; Articulated Trucks</b>		<b>Model</b>	<b>Package No.</b>	<b>Package Name</b>	<b>Warranty</b>	<b>Retail Price (Inc Warranty)</b>	<b>Factory Code</b>													
<b>725</b>		725C	725C - 1	725C STD BODY/CHASSIS	0	377,173	9.00E-02	<a href="#">Create Quote</a>												
			725C2	725C2 - 1	725C2 DCA1	6,010	386,226	9.00E-02	<a href="#">Create Quote</a>											
<b>730</b>		730	01-730	730 TRUCK W/ LINER	0	6,222	9.00E-02	<a href="#">Create Quote</a>												
			730C	730C - 3	730C DCA1	0	424,519	9.00E-02	<a href="#">Create Quote</a>											
				730C - 5	730C - DCA4	0	455,377	1.00E-01	<a href="#">Create Quote</a>											
				730C - 5	730C DCA3	6,970	439,157	9.00E-02	<a href="#">Create Quote</a>											
				730C-2	730C - PDC	0	Call HQ	9.00E-02	<a href="#">Create Quote</a>											
			730C2	730C2 - 1	730C2 LINER / HEATED BODY / TAILGATE	6,970	470,507	9.00E-02	<a href="#">Create Quote</a>											
	730C2 - 2	730C2 DCA1	6,970	442,295	9.00E-02	<a href="#">Create Quote</a>														
		730Q	730-1	730 DCA1	0	384,212	5.00E-02	<a href="#">Create Quote</a>												
			730-2	730	0	417,406	9.00E-02	<a href="#">Create Quote</a>												
<b>735</b>		735	01-735	735 TRUCK W/ LINER	0	7,000	9.00E-02	<a href="#">Create Quote</a>												
			735C	735C - 1	735C HEATED BODY/TAILGATE/BODY&CHASSIS STD	14,390	610,661	9.00E-02	<a href="#">Create Quote</a>											
				735C - 2	735C NO LINER	0	583,193	1.00E-01	<a href="#">Create Quote</a>											
<b>745</b>		745C	745C - 1	745C DCA1	0	632,716	1.00E-01	<a href="#">Create Quote</a>												
			745C - 2	745C-745C ARTICULATED TRUCK DCA 4	0	637,559	1.00E-01	<a href="#">Create Quote</a>												
<b>&gt; Asphalt Compactors</b>		<b>Model</b>	<b>Package No.</b>	<b>Package Name</b>	<b>Warranty</b>	<b>Retail Price (Inc Warranty)</b>	<b>Factory Code</b>													
<b>CB434</b>		CB-434D	434-01	CB434D 2AMP Open Canopy	0	115,304	9.00E-02	<a href="#">Create Quote</a>												
			434-02	CB434D 2AMP ROPS/FOPS	0	117,128	9.00E-02	<a href="#">Create Quote</a>												

The list includes the model name as ordered from the factory, the name of the Standard Package for that model or the Caterpillar MA, the cost of the warranty, Retail Price, Factory Code, and a **[Create Quote]** button.

Alternatively, you can view the Standard Packages from the model's left menu.

Base Model: D3 [Add Model]		Standard Packages (Manager View) - Base Model														
<b>&gt; Small Dozers</b>		<b>Model</b>	<b>Package No.</b>	<b>Package Name</b>	<b>Sell Price</b>	<b>Warranty</b>	<b>Sell Price (Inc Warranty)</b>	<b>Price List Add.</b>	<b>Retail Price (Inc Warranty)</b>	<b>Cost</b>	<b>GP %</b>	<b>CAT Disc. %</b>	<b>Focus Disc.</b>			
D3		D3K	CAN - 7890	XL Cab 104' Blade 16: SGB Sys	98,240	0	98,240	5.0	98,240	92,394	5.95	3.0		<a href="#">Create Quote</a>		
Total: 1 package(s) [1 to 1 of 1 packages] << <   > >> Size of page: [10 / 10]																

The Standard Package list will display with the Package Number, Package Name, Description, and System Default GP%.

### Inventory:

Select the **Inventory** link in the left menu. A list of dealer inventory for the model being quoted will display.

Click the Equipment Related Tasks icon next to the Stock Number of the unit you want to quote, then select **[New Quote]** from the list.

## Previously Created Quote from the Quote List

Click on the quote number from the Quote List. Click on the **Common Tasks** link, then select **[Create Copy to New Quote]**.

## Additional Documents

In addition to the quote and Sales Agreement, the Documents section will also contain documents such as RPO, Warranty, CSA, Shop Get Ready Form, Rental Agreement, Quote Worksheet, Warranty Worksheet, Used Equipment Extended Coverage Program (available only for used machines), Rental Agreements, and CAT Delivery Service Record or DSR (available only for new machines).

If there are any items in the Media Library relating to the equipment quoted, it will be added to this section and available on Quote Sending Email. You can change the description and also delete them from the quote revision if needed.

The screenshot shows the IQUOTE software interface. At the top, there's a navigation bar with 'IQUOTE' and 'Construction (G)'. Below that, there are various menu items like 'Quotes', 'Standard Packages', 'BHL', 'TH', 'CCE', 'TTT', 'WL', 'TTL', 'HEX', 'MG', 'TRK', 'WTS', '800', 'WT', 'MC&G', 'SCOM', 'ACOM', 'UCOM', 'LAP', 'PAV', 'FRSTR', 'USDNC', 'NONCU', 'Admin', and 'Links'. A search bar is present with 'Look for Quotes with Quote Number that equals In All Divisions Search'. Below the search bar, there's a 'Quote Details - Documents List' section. It includes a 'Revisions: 01 - In Progress' indicator and tabs for 'Configuration', 'Payment Terms / Taxes', 'Quote Editor', 'Agreement Editor', and 'Documents'. The 'Documents' tab is active, showing a list of documents. The list is divided into 'Predefined Documents' and 'Uploaded Documents/Media Library'. The 'Predefined Documents' section lists various documents like 'RPO Agreement document', 'Quote document', 'Sales Agreement document', 'Warranty document', 'CSA document', 'Shop Get Ready document', 'Warranty Worksheet document', 'Quote Worksheet document', and 'CAT Delivery Service document'. The 'Uploaded Documents/Media Library' section lists 'DATA GOVERNANCE CONSENT and TRIAL OFFER - 2017.doc' and 'D5 Specification SD1234 CAT D5 Specifications.docx'. Each document entry includes a description, name, last changed date, and edit/view icons.

## Quote Worksheet

This document was developed to allow dealers to save the Quote Worksheet in PDF format and contains the quote Configuration, Financial, and Payment Terms. Each revision has its own document and is displayed on the document list. The document can be viewed using the PDF icon on the configuration tab or emailed using the email icon.

## COMMON TASKS

Hover over the **Common Tasks** drop-down menu at the top right of the Quote Details page to display the following tasks:

### Quote Task

**Edit Quote Header:** Edit the customer and opportunity information and assign a sales rep, or select a different stock number than the original quote.

**Share Quote:** Allows the quote to be visible to other sales reps so that they can create a quote based on it, or they can assist in finishing the quote and save their changes.

**Delete Quote:** Deletes the quote and all revisions.

**Lock Quote:** Only available to Admin users; changes the quote so that it cannot be edited and removes any editing ability including changing the status and quote header.

**Set Quote to Public:** Allows the quote to be viewed by all users.

**Reopen Quotes:** Based on the user's access level to iQuote (admin, power users, and sales reps), deals in No Deal and Lost status will be able to be changed back to Submitted or Open. This will also change the status and stage of the opportunity in SalesLink.

Reopen Quotes in Won or Lost Status:

In order to reopen a quote that has an opportunity stage of Lost or Won, you need to first reopen the quote that set the opportunity to Lost or Won and then reopen the No Deal quote.

Reopen Quote in No Deal Status:

With the possibility of multiple quotes on one opportunity, the stage of the opportunity could be different than the status of the quote. No Deal quotes can only be reopened if the opportunity linked to the quote has a stage of Development or No Deal.



## Edit Quote Status

**Submitted:** Select Submitted when the quote is presented to the customer. On the Submitted screen you have the option to add a completed activity that will appear on the sales rep's calendar in SalesLink.

**NOTE:** This process doesn't create an activity follow-up. The follow-up will need to be created manually by the sales rep.

### Change to Won, Lost, or No Deal:

Once the decision is made by the customer, change the status of the quote accordingly to one of the following:

- Won – The quote was accepted by the customer. This will also create a new deal in COTI if your system is enabled.
- Lost – The quote was not accepted by the customer and they chose to purchase from a competitor. The lost sale information will be visible in SalesLink.
- No Deal – The quote was not accepted by the customer for reasons other than purchasing from a competitor.

If the system is configured to collect competitive information, you will see the following information pre-populated from the quote's information when the quote status is changed to Won, Lost, or No Deal:

- Sales Rep (quote sales rep)
- Transaction Date (current date)
- County (from Sales Agreement)
- Model (quote model)
- Manufacturer (quote equipment makes)
- Cust. Invoice w/o trade (quote configuration - Grand Total)
- Serial # (equipment serial number)
- Year of Manuf (equipment year manufacture)

If the status is set to Won, the following fields should be pre-populated:

- Sales Territory (region where the quote sales rep is assigned)
- Country (customer country)
- PIN County (from SA County)
- State Tax (if there are taxes for the quote revision)
- Status (Equipment Status)
- Governmental (Quote set up)
- Deal Sheet GP% (GP% of the quote revision)
- Stock Number (Equipment Stock Number)

## Current Revision Tasks

**Copy to New Quote:** Creates a copy of the existing quote, assigns a new quote number and revision to it.

**Copy to New Revision:** Copies all of the details of the original revision of the quote to a new tab, allowing for a modified version of the existing quote but leaving the details of the original in place.

**Send Email:** See the **Email** Quote section for more information.

**Delete Revision:** At times a sales rep may choose to run some “What-if” scenarios with a quote without having those changes saved with the quote. This feature allows for the deletion of this revision.

# QUOTE SUMMARY PAGE

When first creating a new quote the following screen will be displayed:

## Single or Multiple Opportunity Association

If this is an Opportunity Quote, there is an option to create a new opportunity or relate the quote to an existing opportunity in SalesLink.

- If this is a new opportunity, it will assign an opportunity number in SalesLink with the product details and estimated revenue for the customer.
- If this is related to an existing opportunity, select the customer and the rep and the system will provide the open opportunities that can be assigned to the quote.
- Click **[Add]** to associate with a single product opportunity. Click **[Select]** to replace a product. If replacing a Primary product, the information in the quote will be used to calculate the estimated revenue for the opportunity and replace the product information.

See the SalesLink User Guide for more information on opportunities.

## Quick Quote

Clicking the **[Quick Quote]** button will open the quote editor and download the document as a Microsoft Word file to your computer automatically.

**Page 1** contains the model name and the standard layout for a quote introduction.

**Page 2** contains Standard Package features from the Caterpillar price list for this model, listed by compartment.

**Page 3** contains Additional Components that are included over and above what is on the Caterpillar price list.

**Page 4** contains the price, warranty, and any additional considerations as well as a closing paragraph that can be customized to suit each customer.

## Custom Quote

Clicking the **[Custom Quote]** button will display a screen containing a series of tabs across the top.

The screenshot displays the UPTAKE iQuote software interface. At the top, there's a navigation bar with 'UPTAKE iQuote' and a dropdown menu set to 'Construction (G)'. Below this is a search bar with 'Look for' and 'Quotes' selected. The main content area shows 'Base Model: 725' and 'Quote Details' for 'Quote No: 124967'. A table titled 'CONFIGURATION DETAILS' lists components with columns for Ref No., Weight (lbs), Qty, List, Cost, GP%, and Sell. The table includes items like '725C ARTICULATED TRUCK' and various attachments such as 'BODY, STANDARD', 'EXHAUST, STANDARD', 'NO ROOF LIGHTS', 'NO MACHINE SECURITY SYSTEM', 'PRODUCT LINK, SATELLITE PL321', 'CHASSIS, STANDARD', 'CD/RADIO, HEAVY DUTY', 'MIRROR, STANDARD', 'SEAT, STANDARD', and 'TANK, STANDARD FUEL'. A summary section on the right shows 'Total Cost US (Excl. Warranty): 339,456', 'Total Sell US (Excl. Warranty): 377,173', 'Warranty Sell US: N/A', and 'Grand Total Sell US (Incl. Warranty): 377,173'. The status is 'In Progress' and the last update is 'Nov 01, 2019 11:32 AM'.

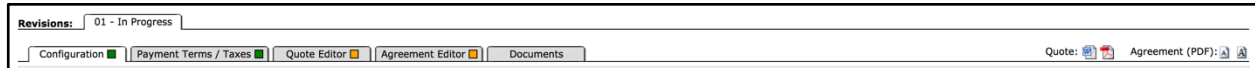
Components	Ref No.	Weight (lbs)	Qty	List	Cost	GP%	Sell
CAT Consist							
725C ARTICULATED TRUCK	378-9794		1	466,650	335,988	10.0%	373,320
DBS Inventory Attachments							
CAT Components (Attachments)							
BODY, STANDARD	364-2247	L	1	0	0	10.0%	0
EXHAUST, STANDARD	379-3745	P	1	0	0	10.0%	0
NO ROOF LIGHTS	373-3664	L	1	0	0	10.0%	0
NO MACHINE SECURITY SYSTEM	373-3662	L	1	0	0	10.0%	0
PRODUCT LINK, SATELLITE PL321	396-1139	L	1	0	0	10.0%	0
CHASSIS, STANDARD	433-2087	L	1	0	0	10.0%	0
CD/RADIO, HEAVY DUTY	373-3678	L	1	560	403	10.0%	448
MIRROR, STANDARD	416-4354	L	1	0	0	10.0%	0
SEAT, STANDARD	324-7017	L	1	0	0	10.0%	0
TANK, STANDARD FUEL	364-8696	L	1	0	0	10.0%	0

From this screen you can change the configuration or pricing, add payment term options for the customer to choose from, modify the way the quote will appear when sent to Microsoft Word or PDF, or go directly to the development of a Sales Agreement.

# CUSTOMIZING THE CONFIGURATION

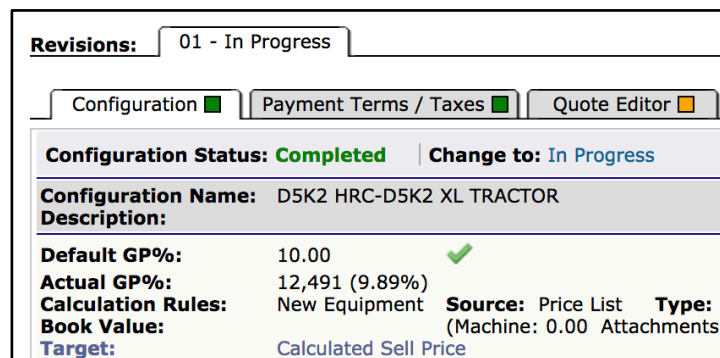
## Tabs

Each quote has a workflow for Product Configuration, Payment Terms, Quote Editor, and Agreement Editor, each with its own options that allow a sales rep to develop the Quote and Sales Agreement for printing and submission to the customer.



Clicking on the **Quote** link opens a Microsoft Word version of the quote containing all of the components that have been entered or selected to that point. Click on the two buttons to the right of the **Agreement** button and iQuote opens either a letter or legal-size PDF of the agreement.

The Configuration tab is where Pricing, GP%, equipment consist, attachments, extra details specific to this quote or standard on every quote, claim programs, warranty options, trade-ins, or CSA are modified for the purposes of developing the price that will appear on the quote. Prior to changing the configuration, you must change the status of the configuration to In Progress.



Once the configuration has been changed to **In Progress**, a Pencil icon will appear in every section of the page. To modify one of the sections, click on the Pencil icon.

## Change the Equipment Source

If you need to change the equipment that is being quoted but the customer information can stay the same, click the Pencil icon beside the source field to choose a different piece of equipment from other sources.

## Change the Overall Pricing, GP \$ and %

Click on the Pencil icon in the top right corner of the Package section. The General Information page will display.

- **Configuration Name:** Created by the Quote Administrator when the package is created. You can modify it or the Description of the package, but neither will appear on the quote.
- **Shipping To:** A list where the choice is made as to which branch this piece of equipment will be shipped to for the purposes of determining if there will be freight charges added to the price.
- **Target:** A section where the choice will be made as to how the price that will be quoted to the customer is calculated.
- **Calculated Sell Price** (the default): Allows the bottom line price and any additions or discounts applied in the remaining sections of the configuration to be calculated based on the model system default GP% (set by the package administrator), or if the model doesn't exist it will be based on the model default GP% (also set by the iQuote administrator) and any additions or discounts applied in the remaining sections of the configuration.
- **GP%:** Will override the model default and recalculate the price based on the selection. Subsequent change to the configuration in the lower sections will all be priced at this GP%.
- **Sell Price:** Will not allow the bottom line price of the quote to change regardless of additions or discounts applied in the remaining sections of the configuration. For example, if the target sell price of the deal is set at \$110,000, the Actual GP% changes to 19.2%. Any changes to the configuration to add or remove cost will leave the sell price at \$110,000 but will move the GP% on the deal higher or lower as each change is made.

## Package Currency, FX Rate, and Credit Claim FX Rate

These items apply to Canadian dealers only.

## Price List Increase Adjustment %

This option is usually applied to a quote being delivered to a customer in the month preceding a change in CAT List price for machines that will not deliver until after the price list change has taken effect. If you wish to change this, click in the box next to **System Defined** and type a number, such 1.0, that will adjust the price by that percentage.

## Cat Discount %

This number is set by the iQuote administrator and can be changed in the Model Config.

## System Current or Non-Current

This legend indicates on a line-by-line basis whether the feature or price is current as of the morning of the date the quote is prepared. This will also be the case when opening a quote that was created some months prior to the current date.

Any change to override pricing on a feature or price is changed to show that item is User Defined, meaning it was overwritten by the person developing the quote. If any pricing is marked as Unconfirmed, it means a change was made on the CAT price list last night but the iQuote administrator has not approved its introduction to the package. Before using this price, always check with your Sales Coordinator.

## Capability to Override Zero from CAT Price List

If the quote is from a Price List and the List value is \$0, the user has the option to update this value by clicking the Pencil icon next to the CAT Consist.

**NOTE:** This will only work this way if CAT Price list is \$0. All other amounts coming from the Price List won't be available for changing.

## Change the Consist Details

Click on the Pencil icon at the far right of the Consist line to display the other consist options available on the CAT price list. If you make a selection by clicking in the check box to the right of the package you will be asked if you wish to use the Target GP% or one that you set.

When completed, click **[Add]** and then click **[Remove]**. The choice will replace the consist package in the quote configuration.

**NOTE:** This is not usually necessary as the package is always prepared by the iQuote Administrator and should only be used when developing a Custom Quote for a package not pre-built prior to your quote.

## Change the Cat Components (Attachments)

Click on the Pencil icon at the far right of the Cat Components line to display the components that are included in the package.

Base Model: D3		Edit CAT Components (Attachments) - D3K						
Selected Attachments:								
Ref No	Components	Use	Weight	Qty	US List	Target GP%		Remove
269-7695	LIGHTS, 6	L	7	1	615	<Not Set>	✓	Edit <input type="checkbox"/>
244-7479	SOUND SUPPRESSION, OMISSION, STD	L	0	1	0	<Not Set>	✓	Edit <input type="checkbox"/>
264-4542	HYDRAULICS, 4 VALVE, WINCH	L	40	1	895	<Not Set>	✓	Edit <input type="checkbox"/>
<span>✓ System Current</span> <span>🔧 Added For Credit Claim</span> <span>⚠ System Non-Current</span> <span>👤 User Defined</span>								
Available:								
Price List Period Attachment Type								
Current <input type="button" value="Mandatory Attachments"/> from D3K: <input type="button" value="Change Model"/>								
Search Tip: Choose "All Categories" and Press "Ctrl-F" to search by keyword.								
Category								
Hydraulics								
Ref No	Use		Weight (lbs)	Qty	List Price At Factory	Target GP%		Add Sel
Select One								
264-4540	L	HYDRAULICS, 3 VALVE, STANDARD		0	1	0		<input type="checkbox"/>
CANNOT BE USED WITH: Ripper								
264-4541	L	HYDRAULICS, 4 VALVE		40	1	\$895		<input type="checkbox"/>
REQUIRED BY : Ripper								
CANNOT BE USED WITH: 244-7454 Installation Arrangement, Winch								
264-4542	L	HYDRAULICS, 4 VALVE, WINCH		40		\$895		<input type="checkbox"/>
Provides 4 valve hyd. capability when ordering								
CANNOT BE USED WITH: 291-5094 Drive, Standard								

The list of attachments is sorted by Reference # and shows the description of the item, whether it is a Line Installed or Pin-on item, the weight, quantity, list price, target GP%, and a column to edit the details or remove the item from the package.

**NOTE:** Removing an Item marked with an L or Line Item may be modifying the package in a way that cannot be ordered using MA pricing, so always consult with a Sales Coordinator before making this choice.

To remove an item from the package:

1. Click in the check box at the right side of the Item line.
2. Click **[Remove]** at the top of the window.

To add an item to the list:

1. Scroll all the way down to the bottom of the window to the drop-down list. The default attachment type is mandatory.
2. From the drop-down list on the right of the Attachment Type box, select **Optional Attachments**. The window will refresh and reappear.
3. From the drop-down list at the far right of the **Category** line, select the category of the attachment that you're looking for.
4. Select a quantity, target GP% (if you wish to change it), and then click in the check box on the right side
5. Click **[Add Sel]** at the top of the window.


**NOTE:** Please review the requirements underneath the attachment to see if some other component such as a lines group or couplers is required as well.



## Add an Inventory Attachment

In the Configuration Details area there is a section for DBS Inventory Attachments, which allows users to add in stock attachments to any quote from Inventory, Price List, and DBS Configuration.

Click on the Pencil icon at the far right of DBS Inventory Attachments. Here you can add attachments from inventory or add them manually.

Base Model: D3			Edit Inventory Attachments - D3G				
<p>● <b>Added Inventory Attachments:</b> <span style="float: right;"> Add Attachment</span></p>							
StockNumber	Ref No	Components	Cost	Labor to Install	Target GP%		
NM03172		EXCAVATOR BUCKET	US\$ 1,231.00	US\$ 100.00	<Not Set>	<a href="#">Edit</a> <a href="#">Delete</a>	
NM04161		EXCAVATOR BUCKET	US\$ 3,985.00	US\$ 200.00	<Not Set>	<a href="#">Edit</a> <a href="#">Delete</a>	
NM04162		EXCAVATOR BUCKET	US\$ 4,888.00	US\$ 300.00	<Not Set>	<a href="#">Edit</a> <a href="#">Delete</a>	
<p>● <b>Added Manually:</b></p>							
Ref No	Components	Cost	Labor to Add	Target GP%	<a href="#">Add New</a>		
123	Tires	US\$ 2,000.00	US\$ <input type="text" value="150.00"/>	<Not Set>	<a href="#">Edit</a> <a href="#">Delete</a>		

Click **[Add Attachment]**. iQuote will search the DBS inventory for attachments for the model of equipment that you are quoting.

If the item you wish to add to the quote is displayed, select it by clicking the check box to the left of the cost. Click **[Add Sel]**.

## Manually Add Consists as per DBS Components

Click on the Pencil icon at the far right of CAT Components (Attachments).

Base Model: D3 Edit CAT Components (Attachments) - D3K

Selected Attachments:

Ref No	Components	Use	Weight	Qty	US List	Target GP%		Remove
269-7695	LIGHTS, 6	L	7	1	615	<Not Set>	✓	Edit <input type="checkbox"/>
244-7479	SOUND SUPPRESSION,OMISSION,STD	L	0	1	0	<Not Set>	✓	Edit <input type="checkbox"/>
264-4542	HYDRAULICS, 4 VALVE, WINCH	L	40	1	895	<Not Set>	✓	Edit <input type="checkbox"/>

System Current Added For Credit Claim System Non-Current User Defined

Available:  
 Price List Period Attachment Type  
 Current Mandatory Attachments from D3K: [Change Model](#)  
 Search Tip: Choose "All Categories" and Press "Ctrl-F" to search by keyword.

Category: Hydraulics

Ref No	Use	Weight (lbs)	Qty	List Price At Factory	Target GP%	Add Sel
Select One						
264-4540	L HYDRAULICS, 3 VALVE, STANDARD CANNOT BE USED WITH: Ripper	0	<input type="text" value="1"/>	0	<input type="checkbox"/>	<input type="checkbox"/>
264-4541	L HYDRAULICS, 4 VALVE REQUIRED BY : Ripper CANNOT BE USED WITH: 244-7454 Installation Arrangement, Winch	40	<input type="text" value="1"/>	\$895	<input type="checkbox"/>	<input type="checkbox"/>
264-4542	L HYDRAULICS, 4 VALVE, WINCH Provides 4 valve hyd. capability when ordering CANNOT BE USED WITH: 291-5094 Drive, Standard	40		\$895		

Selected Attachments are already a part of the configuration on the quote. You can edit each attachment to change the quantity, target GP%, or add notes.

In the Available section, you can add items from a list of mandatory or optional attachments for the model being quoted from the current or previous price lists. If there is an attachment from another model you want to add, **[Change Model]** to search.

**NOTE:** Pay close attention to the CANNOT BE USED WITH section of the attachment. iQuote does not prevent an attachment from being added.

## Adding Other Components

There may be quotes where you want to add an item that is not on the CAT price list, such as a locally manufactured specialty item. To add that item, click on the Pencil icon at the far right of the Other Component line.

UPTAKE iQuote Rates for Dealership Region Region demouser1 Demo

Base Model: 315 Edit Other Components - 315FL

Components

Ref No.	Weight	Qty	US Cost	Target GP%
Component: Description:				
Ref No.:	Weight:	Qty: <input type="text" value="1"/>	Cost:US\$ <input type="text"/>	GP%: <input type="checkbox"/>
<input type="button" value="Add"/> <input type="button" value="Cancel"/> <input type="button" value="Reset"/>				

There are no Other Components added.

Enter all information into the fields, then click the **[Add]** button. Enter as many components as needed.

## Extras

Extras are typically items entered by the iQuote Administrator that attach a cost to the deal, and are a preset for every package quoted on that model, i.e. PDI cost, manuals, etc.

To add or remove items to the list, click on the Pencil icon at the top right corner of the Extras list.

**UPTAKE iQuote** Rates for Dealership Region Region demouser1 Demo  
Edit Extras - 315FL

Base Model: 315

**System Extras:**

Extra	System	User Defined	Target GP%
<input checked="" type="checkbox"/> PDI	<input checked="" type="checkbox"/> US\$ 1,500	<input type="checkbox"/> US\$	<input type="checkbox"/>
<input checked="" type="checkbox"/> Freight to Customer	<input checked="" type="checkbox"/> US\$ 600	<input type="checkbox"/> US\$	<input type="checkbox"/>
<input checked="" type="checkbox"/> Standard Warranty	<input checked="" type="checkbox"/> US\$ 410	<input type="checkbox"/> US\$	<input type="checkbox"/>

Update Reset

**Custom Extras:**

Extra	Cost	Target GP%	Changed
	US\$		<input type="checkbox"/>

There are no package extras setup. Save

To remove an item, uncheck the box to the left of the item and then click the **[Update]** button.

To add an item, click in the area below the Extra heading and type the description of the extra, then choose the currency it will be quoted in from the drop-down list under the Cost heading. Type in a dollar amount without dollar signs or commas. Set a Target GP% if necessary, then click **[Save]**.

## Standard Jobs

Some dealers use DBS Standard Jobs for processes like PDI or to ensure standardized quoting for the same process regardless of the branch providing the service.

To add or remove items on the list, click on the Pencil icon at the top right of the Standard Jobs list.

**Base Model: 272** Standard Jobs - 272C

**Current Standard Jobs Selected:**

Job Comp	Description	Job Location	Cab Type	Work Application	Business Group	Shop/Field	Quantity	GP Percent	Labor Hours	Parts Amt	Labor Amt	Misc Amt	Total Amt	Add
There are no standard jobs selected.														

**Standard Jobs Search:**

All  Setup Machine (Job Code: 587)  Model  FR Exchange  Both  Find

Model	S/N Begin	S/N End	
302.5	04AZ00001	04AZ99999	<a href="#">View</a>
330	02EL00001	02EL99999	<a href="#">View</a>

**Generic Rates**

FINNING 324 EXCSETUP	<a href="#">View</a>
FINNING 325 EXCSETUP	<a href="#">View</a>

## DBS Costs

When quoting new inventory equipment, iQuote can provide visibility to Transaction Register costs against this equipment. It can be configured to pull costs of certain transaction codes into quotes.

To add or remove items on the list, click on the Pencil icon at the top right of the DBS Costs list.

Base Model: D5						Edit DBS Costs - D5G XL			
DBS Costs:									
DBS Cost Type	Transaction Date	Description	Invoice Number	Stock Number	Cost	Target GP%	Included	Changed	
Work Order	03/08/2007	SERVICE INVOICE-99G3006	0607507	NM26890	120	<input type="checkbox"/>	<input checked="" type="checkbox"/>		,
Work Order	06/20/2007	SERVICE INVOICE-99G3006	0321354	NM26890	14,449	<input type="checkbox"/>	<input checked="" type="checkbox"/>		,
Work Order	07/31/2007	PARTS INVOICE - 99G3006	GGC119436	NM26890	62	<input type="checkbox"/>	<input checked="" type="checkbox"/>		,

## Add a Post-Sale Credit Claim

Post-Sale credit claims are used to take advantage of model-specific or application-specific program funding from Caterpillar programs. There is a table in iQuote that has all of the CAT claim programs listed and the rules for the application of that program for each model.

To add a Post-Sale Credit Claim, click on the Pencil icon to the right of the Post-Sale Credit Claim line.

UPTAKE iQuote		Rates for Dealership Region Region		demouser1 Demo	
Base Model: 315				Edit Post Sale Credit Claims - 315FL	
System Claims:					
Selected Claims		Choose		RSA Calculator	
PSC List \$: 238,440.00		PSC Net \$: 171,676.80			
RSA Calculator		RSA%		10	
		RSA Available \$:		17,167.68	
Total RSA		Over/Under \$:		Total Discount on Quote \$:	

To apply the program to the deal, click on the button on the right side of the program that you want to use.

For each item that you wish to add, select it by clicking on the arrow at the right and then enter either the % of list, % of net, or \$ amount that you wish to apply from the AIM dollars available to the deal. If you do not enter a Target GP% on the line, the item will be marked up by the deal GP%. When all entries are completed, click the **[Update]** button.

**NOTE:** Please refer to the finance program administrator at your dealership as the application of the inflow and outflow \$ to the deal in iQuote may be configured differently for your dealership.

## Add or Change a Warranty

The iQuote Administrator will have attached the default new machine warranty to the package, but there is also a warranty table attached to iQuote that allows for optional warranties to be quoted to the customer.

All the warranties for all models are shown from the quote base model. When selected, the description of the warranty is formatted as model - months/hours + coverage type.

UPTAKE iQuote		Rates for Dealership Region Region															demouser1 Demo																																																																																																																																																																																																																																																																																																																																																																									
Base Model: 315																	Edit Warranty - 315FL																																																																																																																																																																																																																																																																																																																																																																									
<p><b>Added Warranties:</b></p> <p>Description: There is no warranty set up for this package. <span style="float: right;">Sell Amount</span></p>																																																																																																																																																																																																																																																																																																																																																																																										
<p><b>System Warranty:</b></p> <p>Description: There is no warranty set up for the current base model. <span style="float: right;">Sell Amount</span></p>																																																																																																																																																																																																																																																																																																																																																																																										
<p><b>Uploaded Extended Warranty:</b> Category: NONGOVERNMENT <span style="float: right;">Add</span></p> <table border="1"> <thead> <tr> <th rowspan="2">Base Model</th> <th rowspan="2">Model</th> <th rowspan="2">Months</th> <th rowspan="2">Coverage Type</th> <th colspan="16">Sell Amount</th> </tr> <tr> <th>1000</th><th>1500</th><th>2000</th><th>2500</th><th>3000</th><th>3500</th><th>4000</th><th>4500</th><th>5000</th><th>5500</th><th>6000</th><th>6500</th><th>7000</th><th>7500</th><th>8000</th><th>8500</th><th>9000</th><th>9500</th><th>10000</th> </tr> </thead> <tbody> <tr> <td rowspan="24">315</td> <td rowspan="24">315</td> <td rowspan="6">24</td> <td>POWERTRAIN</td><td>90</td><td>110</td><td>120</td><td>130</td><td>140</td><td>150</td><td>150</td><td>160</td><td>170</td><td>180</td><td>190</td><td>200</td><td>210</td><td>220</td><td>230</td><td>240</td><td>250</td><td></td><td></td> </tr> <tr> <td>POWERTRAIN + 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## System Warranty

The list of warranties was added manually on Model Administration application. If you want to add a System Warranty, select the warranty from this list and click **[Add]**.

## Uploaded Extended Warranty

The list of warranties was imported from a CAT Excel file on the Model Administration application. To add an Extended Warranty from CAT, select the warranty amount from the Extended Warranty list and **[Add]**.

## Custom Warranty

In order to win new business or enhance PINS, a dealer may choose to offer a custom warranty funded by the dealership instead of Caterpillar. This section allows the user to input a warranty for the quote. To add a Custom Warranty, enter the description of the warranty, the Cost Amount, and then click **[Add]**.

## Add a CSA

To add a CSA, click on the Pencil icon to the right of the CSA line.

Enter a description, select a sell type from the drop-down list, then enter a dollar amount without dollar signs or commas in the box to the right. Click the **[Add]** button.

## Introduce a Trade-in to the Quote

Trade-in are added to quotes to account for how the trade-in will affect the GP% on the deal, or in situations where the dealer chooses to pay more for a machine in trade than it is worth (over-allowance) to win a deal. To add a trade-in to the quote, click on the Pencil icon to the right of the Trade-ins line.

Enter all required information into the form fields. Once entered, the information will populate the quote and the Sales Agreement fields. Click the **[Add]** button.

## Options & Bundles

Options & Bundles are a set of configurations that you can add but won't affect the quote configuration.

Difference between Options and Bundles:

- **Options:** Can be added/removed from the quote individually. Only one list of Options will be available on the quote.

- **Bundle:** A group of options. You cannot add only one item from the bundle to the quote and you cannot delete only one item from a bundle after it's been added to the quote.

## Add an Option

Select the checkbox next to the option and click **[Add to Quote]**. The item(s) will be added to the configuration section of the quote.

**NOTE:** Each option item can only be used once on the quote configuration.

## Remove an Option


To remove an option from the quote, click the **[Edit]** button and then delete/change the option.

## Remove an Option from the Option List

To remove an option from the option list, click the **[Edit]** button and then remove/change it. If the option is being used on the quote, it won't be available to remove/change.

## Add a bundle on the Quote Configuration

A bundle can only be added once on the quote, but you can create multiple bundles. Click **[Add to Quote]** to add the bundle to the quote.

The bundle(s) will be added to the configuration section of the quote and the  (1) icon will appear before the bundle description to indicate that it is an item from a bundle. The number in brackets indicate the bundle number that was added.

**NOTE:** Each bundle item can only be used once on the quote configuration.

## Remove/Change an Option from a Bundle List

To remove/change an option from a bundle, click **[Edit]** and then remove/change it. If the bundle is being used on the quote configuration you can only change the Description and the GP%.

## Remove a Bundle from the Quote Configuration

To remove a bundle from the quote, click **[Remove from Quote]**. You can also click the **[Edit]** button, select **[Remove Bundle from Quote Configuration]**, then click **[Update]**.

**NOTE:** A bundle item on the quote configuration won't be available for removing/changing.

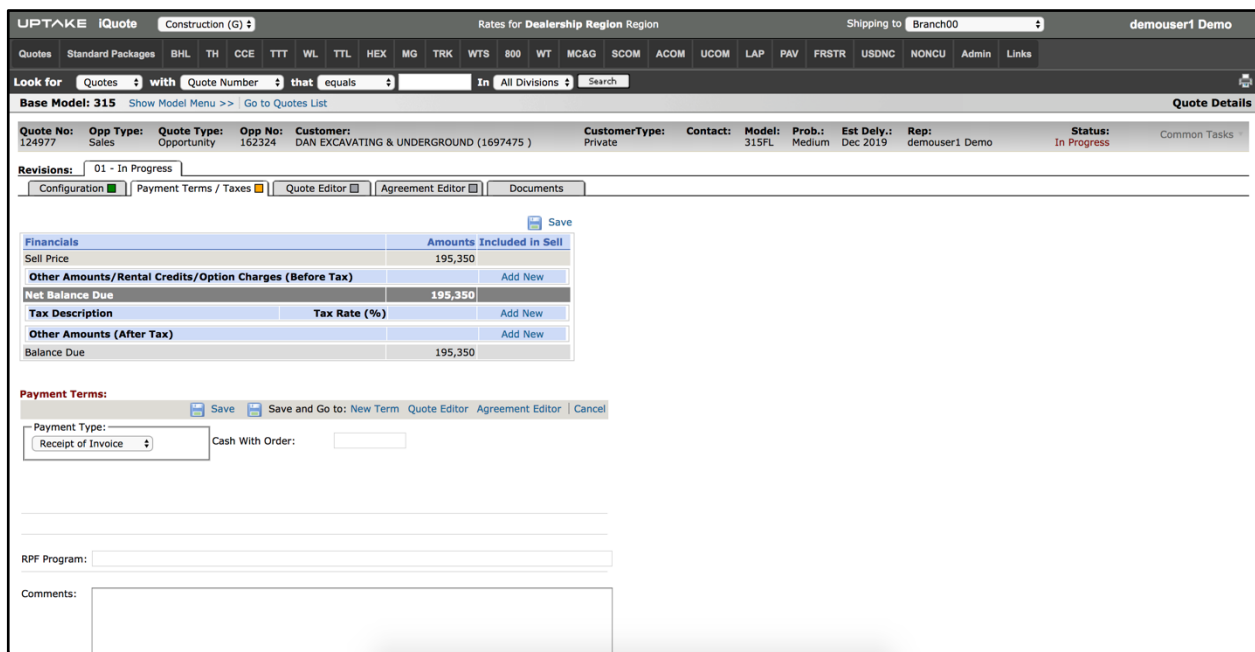
The Configuration page is now complete. To mark it as complete scroll back up to the top of the page to the Configuration line and select **Complete and go to Payment Terms**.

# ADDING PAYMENT TERMS

5 different types of Payment Terms can be quoted to a customer:

- Receipt of Invoice
- Delivery
- CSC (Conditional Sales Contract)
- Lease
- RPO (Rental with Purchase Option)

There is no limit to the number of Payment Terms that can be added to a quote. Each type has its own specific information to be entered.



## Receipt of Invoice and Delivery

There are options at the top that control how the price will be shown on the quote document. If you put a check mark next to either the Warranty or the Trade Allowance, then the prices will read as **Included** on the quote document.

If you do not check them, they will be priced separately. Enter the Cash with Order without a dollar sign or commas. When completed, click **New Term** at the top to add another option, **Quote Editor** to change the quote, **Agreement Editor** to print a Sales Agreement without a quote, or **Save Only** to stay on the page.



## CSC (Conditional Sales Contract)

Select CSC from the drop-down menu, then enter the payment terms information into the required fields.

**Payment Terms:**

Payment Type: CSC
 Auto Calc
  Payment in Arrears

Cash With Order: 
 Payment Period: Monthly

---

Payment Amount: 
 Balance to Finance: 
 Document Fee: 300

Number of Payments: 
 Contract Interest Rate:\*

---

RPF Program:

Comments:

**Note:**

- Please, use T-Value program in order to determine the amounts to be entered in each field.

When completed, click **New Term** at the top to add another option, **Quote Editor** to change the quote, **Agreement Editor** to print a Sales Agreement without a quote, or **Save Only** to stay on the page.

## Lease

The procedure is exactly the same as listed for CSC above except there is an additional field for a Buyout Amount at the end of the lease.

## RPO (Rental with Purchase Option)

Enter the Cash with Order (if any), Monthly Rate, Overtime Rate (if any), select a Minimum and Maximum Term for the agreement in the drop-down lists next to each. Select either Net Payment upon Receipt or Other for the payment terms. If you choose Other, enter the arrangement being quoted. RFP Program and comments are optional.

When completed, click **New Term** at the top to add another option, **Quote Editor** to change the quote, **Agreement Editor** to print a Sales Agreement without a quote, or **Save Only** to stay on the page.

## VIEW THE QUOTE

You have now completed the configuration and payment terms pages of the quote. At this point, you may decide to see the quote as it would look in Microsoft Word or PDF. At the far right side of the Workflow Tabs line is a Microsoft Word logo next a blue link that says **Quote**. Click the link and the quote will open with all of the information displayed as entered on the Configuration and Payment Terms tabs.

A Microsoft Word document will open:

- **Page 1** contains the model name and the standard layout for a quote introduction.
- **Page 2** contains Standard Package features from the CAT price list for this model, listed by compartment.
- **Page 3** contains Additional Components that are included over and above what is on the CAT price list.
- **Page 4** contains the price, warranty, payment terms, trade-in details, CSA quotes and any additional considerations as well as a closing paragraph that can be customized to suit each customer.

You can also save this document to your local computer.

## QUOTE EDITOR

The Quote Editor is used to make changes to the quote that do not affect the price but rather the presentation of the quote. You can change the cover page appearance, control the display of standard features and components, and review and modify the text that accompanies the Warranty / CSA / Trade-in information selected on the Configuration tab.

As each page is modified, it is important to move to the next page by clicking the **[Save and Go]** buttons at the top of the quote. Each of these selections will save the information changed on the page and update the Microsoft Word document connected to the quote. If you make changes and then click on one of the other pages, your changes will not be saved.

### Change the Cover Page / Footer Section

The logo line allows you to choose None if you are printing on company letterhead, Black and White if you are printing on a blank page on a black and white printer, or Color if printing on a blank page on a color printer. Edit any other fields as necessary.

## Add Picture on the Cover Letter

This feature allows you to add a selected image on the quote document which will be displayed on the first page of the cover letter. There is no option to change the location or size of the image on the document. Image formats supported are .jpg, .bmp, .png, and .gif.

## Default Image on the Document

Each model can have a pre-setup equipment image done through the Model Config – Model Admin page. When the quote is created this image is added on the quote document by default. You have the option to remove/change that image from the quote. This default image coming from Model Admin is not available for Used Machines quotes, but you will still have the option to add an image of the used equipment on the quote.

## Change Image on Quote

If you have an actual image of the machine being quoted, you can attach the image to the quote. Click **[Attach a file]**, upload your image, then click **[Save]**.

## Change the Standard Features Section

The compartments of features are listed in the order in which they appear on the CAT price list and include all features. The order of the compartments can also be changed or turned off as needed.

The screenshot displays the UPTAKE iQuote application interface. At the top, there is a navigation bar with 'UPTAKE iQuote' and 'Construction (G)'. Below this is a search bar with 'Look for Quotes with Quote Number that equals In All Divisions'. The main content area shows 'Quote Details' for quote number 124977, including fields for Opp Type (Sales), Quote Type (Opportunity), Customer (DAN EXCAVATING & UNDERGROUND), and Status (In Progress). A 'Revisions' section shows '01 - In Progress'. Below this are tabs for 'Configuration', 'Payment Terms / Taxes', 'Quote Editor', 'Agreement Editor', and 'Documents'. The 'Standard Features' section is active, showing a list of features with checkboxes. The features include: POWERTRAIN, Diesel engine C4.4 certified to, EPA Tier4 final, EU Stage IV, Japan MLIT Step 5, 2300m/7550ft altitude capability, w/ no derate, Waved fin radiator w/ enough space for cleaning operation (2585), Radial seal air filter, (OPERATOR ENVIRONMENT continued), Beverage holder with slit, Literature holder, Utility space for magazine, Radio mounting (DIN size), Mounting for two stereo speakers (two locations), Storage compartment suitable for lunch box, and a partially visible 'and small storage pocket for'. Each feature has a checkbox and a dropdown arrow.

To hide an individual compartment or list item from the quote, click the check box to the right of line.

To promote or demote a compartment or list item, click on the upward pointing arrow next to the heading of the compartment or list item.

To create a new Compartment, click on the **[New Compartment]** button and type the name of the Compartment.

When completed, click on either the **[Save and View Document]** button or the **[Save and Go to Components Section]** button if you wish to move to the next tab.

## Change the Components Section

The components view can be modified to allow the CAT reference numbers and the individual list prices of the components to be displayed.

COMPONENTS	Ref No. <input checked="" type="checkbox"/>	List <input type="checkbox"/>	
315F L HEX AM-N BCF2	509-9636	180,220	<input checked="" type="checkbox"/> ^ v
REACH BOOM HD PKG	499-3898	12,100	<input checked="" type="checkbox"/> ^ v
STICK, R9*2 HD	394-7476	5,800	<input checked="" type="checkbox"/> ^ v
CYLINDER, BKT	385-2832	1,450	<input checked="" type="checkbox"/> ^ v
LINKAGE, BKT W/O LIFT	383-2513	1,755	<input checked="" type="checkbox"/> ^ v
VALVE PKG, HYD TCS	499-3901	1,040	<input checked="" type="checkbox"/> ^ v
CTRL, CAT PIN GRABBER COUPLER	500-9174	885	<input checked="" type="checkbox"/> ^ v
DECALS, EXTERIOR ANSI	473-7017	0	<input checked="" type="checkbox"/> ^ v
DECALS, CAB ANSI	473-7132	0	<input checked="" type="checkbox"/> ^ v
PRODUCT LINK, CELLULAR PL641	462-8661	0	<input checked="" type="checkbox"/> ^ v
CONTROL, BLADE, W/PUMP	461-1667	6,850	<input checked="" type="checkbox"/> ^ v
BLADE, 8*2	282-4576	4,110	<input checked="" type="checkbox"/> ^ v
INSTRUCTIONS, ENGLISH	0P-3380	0	<input checked="" type="checkbox"/> ^ v

To add the Reference Numbers and/or List Price to the quote document, click the check box next to the column heading.

To hide an individual component item from the quote, click the check box to the right of line.

To promote or demote a component item, click the upward pointing arrow next to the heading of the compartment or list item.

When completed, click either the **[Save and View Document]** button or the **[Save and Go to Price / CSA / Warranty / Trade-ins Section]** button if you wish to move to the next tab.

## Change the Price / CSA / Warranty / Trade-ins Section

The page allows for free-form additions to standard text entries set up as defaults for each section.

The screenshot displays the 'Quote Details' page in the IQQUOTE application. At the top, there's a navigation bar with 'UPTAKE IQQUOTE' and 'Construction (G)'. Below this is a search bar and a 'Quote Details' header. The main content area shows a table with financial information and a 'Standard Warranty' section. The 'Standard Warranty' section has a checkbox labeled 'Included in the document' which is checked.

Financials		Amounts
Sell Price		195,350
Other Amounts/Rental Credits/Option Charges (Before Tax)		
Net Balance Due		195,350
Tax Description		Tax Rate (%)
Other Amounts (After Tax)		
Balance Due		195,350

Financial information cannot be changed.

**Standard Warranty**  Included in the document

12 Months / Unlimited Hours

Each section has a check box next to **Included in the document** that can be checked to hide the section from the quote.

When completed, click the **[Save and View Document]** button.

## Agreement Editor

The Agreement Editor is used to bring the details already entered when developing the quote into the workflow required to produce a Sales Agreement. Changes to the Settings and Customer Section allow for the additional entry of information not required in the quote but mandatory to produce the Agreement document.

As each page is modified, it is important to move to the next page by clicking the **[Save and Go]** buttons at the top of the quote. Each of these selections will save the information changed on the page and update the PDF file connected to the agreement. The document can be viewed in either letter or legal format and contains a second page of legal terms and conditions associated with a sale or RPO (Rental with Purchase Option).

## Change the Settings Page

Make all necessary changes in the fields displayed on the Settings page.

The Warranty section is filled in by the workflow of the quote, but the CSA detail needs to be entered prior to the agreement being produced.

When completed, click on either the **[Save and View Document]** button or the **[Save and Go to Customer Section]** if you wish to move to the next tab.

## Change the Customer Info

### Customer Details Section

At this point any change to customer information should be recorded. Click in any of the boxes that require changing and edit it.

The Industry Code and Industry Group must be selected from the drop-down menus to support the reporting of the deal to CAT in the proper way. The Equipment Support Contact and Product Support Contact need to be entered where available.

## Alternate Shipping Address Section

This section will be filled out in situations where the shipping address is different than the address in the Customer Details Section above. If it is the same as the address above, click the **[Same as Sold To]** button.

## Other Customer Information Section

This section will be specific to each dealer. Where State and Federal tax exemption numbers are required, and identifying who finances the Federal tax, they are entered here.

When completed, click on either the **[Save and View Document]** button or the **[Save and Go to Components Section]** if you wish to move to the next tab.

## Change the Components Page

If you are able to determine the Stock Number, Serial Number, Year, and Manufacturer, enter each of them in their respective fields.

The screenshot shows the UPTAKE iQuote interface for a quote titled 'Construction (G)'. The 'Equipment Information' section is active, displaying a table of components. The table has columns for 'Equipment Description' and 'Ref No.'. A 'Ref No.' column heading has a checkmark, indicating that reference numbers are being added to the agreement document. The table lists various equipment items such as '315F L HEX AM-N BCF2', 'REACH BOOM HD PKG', 'STICK, R9'2" HD', etc., with their corresponding reference numbers.

Equipment Description	Ref No.
315F L HEX AM-N BCF2	509-9636
REACH BOOM HD PKG	499-3898
STICK, R9'2" HD	394-7476
CYLINDER, BKT	385-2832
LINKAGE, BKT W/O LIFT	383-2513
VALVE PKG, HYD TCS	499-3901
CTRL, CAT PIN GRABBER COUPLER	500-9174
DECALS, EXTERIOR ANSI	473-7017
DECALS, CAB ANSI	473-7132
PRODUCT LINK, CELLULAR PL641	462-8661
CONTROL BLADE W/BLIMP	461-1667

To add the Reference Numbers to the agreement document, click the check box next to the column heading.

To hide an individual equipment item from the agreement, click the check box to the right of line.

To promote or demote an equipment item, click the upward pointing arrow next to the heading of the list item.

When completed, click on either the [Save and View Document] button or the [Save and Go to Financials Section] if you wish to move to the next tab.

### Change the Financials Page

Up to three additional entries can be added manually to the financials section, including items with \$0 added to the cost of the deal, discounts to be extended to the customer, and additional cost items. Do not enter a dollar sign or comma in a field.

Click [Save and View Document] to see the Legal or Letter size version of the Sales Agreement for printing and signatures.

**NOTE:** The version of the Sales Agreement printed is specific to the dealer, so the document that you see may be different.

Buyer		AAB METRO CONCRETE INC	
STREET ADDRESS	150 SPRINGFIELD BLVD	S	<SAME>
CITY/STATE	RICHMOND	COUNTY	
POSTAL CODE		PHONE NO.	416 333 3333
CUSTOMER CONTACT	EQUIPMENT		
	PRODUCT SUPPORT		
CUSTOMER NUMBER	Sales Tax Exemption # (if applicable)	CUSTOMER PO NUMBER	
PAYMENT TERMS			
Financial Services	<input checked="" type="checkbox"/> CSC	<input type="checkbox"/> Lease	First Installment Due Date
Cash With Order	\$9,000.00	Balance To Finance	\$51,389.54
Contract Interest Rate	6.85%	Payment Period	MONTHLY
		Payment Amount	\$2,100.00
		Number of Payments	36
DESCRIPTION OF EQUIPMENT ORDERED / PURCHASED			
MAKE: CATERPILLAR	MODEL: D30	YEAR: 2005	NEW <input type="checkbox"/> USED <input checked="" type="checkbox"/>
STOCK NUMBER: NKG2988	SERIAL NUMBER: GJNG01449	SMU: 976	
D30 XL TRACTOR			213-6339
LIGHTS, CANOPY			183-4269
GUARD, TRACK ROLLER			180-7318
BLADE, D30 XL			185-3581
HYDRAULICS, 4 VALVE			174-5983
RIPPER, PARALLELOGRAM			186-6421
RIPPER S/N BIK01171			
LIGHTS, 6			269-7695
LIGHTS, 4			269-7696
TRACK, 25", SELF CLEANING, SALT			286-4301
TRACK, 16", MD, SALT			286-4303
TRACK, 25", SELF CLEANING, S1			286-4311
TRADE-IN EQUIPMENT			
MODEL: DS - CATERPILLAR	YEAR: 1979	SN: 123456789	Net Balance
PAYOUT TO:	AMOUNT:	PAID BY:	\$50,389.54
MODEL:	YEAR:	SN:	Sec Warranty
PAYOUT TO:	AMOUNT:	PAID BY:	Included
MODEL:	YEAR:	SN:	Net Balance Due
PAYOUT TO:	AMOUNT:	PAID BY:	\$50,389.54
MODEL:	YEAR:	SN:	Document Fee
PAYOUT TO:	AMOUNT:	PAID BY:	\$300.00
MODEL:	YEAR:	SN:	Less Gross Trade Allowance
PAYOUT TO:	AMOUNT:	PAID BY:	(\$10,000.00)
MODEL:	YEAR:	SN:	After Tax Balance
PAYOUT TO:	AMOUNT:	PAID BY:	\$50,689.54
ALL TRADE-INS ARE SUBJECT TO EQUIPMENT BEING IN "AS INSPECTED CONDITION" BY SELLER AT TIME OF DELIVERY OF REPLACEMENT MACHINE PURCHASE ABOVE.			
BUYER HEREBY SELLS THE TRADE-IN EQUIPMENT DESCRIBED ABOVE TO THE SELLER AND WARRANTS IT TO BE FREE AND CLEAR OF ALL LIENS, ENCLAMORATIONS AND SECURITY INTERESTS AS SHOWN ABOVE.			
<input type="checkbox"/> CATERPILLAR EQUIPMENT WARRANTY		<input checked="" type="checkbox"/> USED EQUIPMENT WARRANTY	
INITIAL		INITIAL	
The customer acknowledges that he has received a copy of the Vendor Warranty and has read and understood said warranty. Schedules of sampling (S.O.S.) is mandatory with this warranty. The customer is responsible for taking of samples at designated intervals from all power train components and failure to do so may result in voiding the warranty. Warranty applicable including expiration date where necessary.		ALL USED EQUIPMENT IS SOLD AS IS, WHERE IS, AND NO WARRANTY IS OFFERED OR IMPLIED EXCEPT AS SPECIFIED HERE.	
Warranty applicable:		36 MO/5000 HR EPTW & HYD	
CSA			
NOTES:			
THIS AGREEMENT IS SUBJECT TO THE TERMS AND CONDITIONS ON THE REVERSE. PARAGRAPH 12 CONTAINS A SPECIFIC DISCLAIMER OF WARRANTIES. THE ABOVE SHALL NOT CONSTITUTE A CONTRACT UNTIL EXECUTED AND DELIVERED BY AN OFFICER OF THE SELLER AT ITS HOME OFFICE IN LOUISVILLE, KENTUCKY.			
Executed and Delivered as of		Accepted:	
AAB METRO CONCRETE INC		Buyer	
By:		By:	
Title:		Title:	
If coparties, authorized officer must sign and show separate title. If Partnership, a general partner must sign. If sole proprietor or partner, show which.			
Payment and Performance absolutely and unconditionally guaranteed by the undersigned:			
Witness:			

CAT Financial Details

Trade-In Details

Additional Financials



## Email Documents

Hover over the **Common Tasks** drop-down menu at the top right, then click **[Send Email]**.

The screenshot shows the 'Send Email' dialog box in the UPTAKE IQuote application. The dialog is titled 'UPTAKE IQuote' and 'Rates for Dealership Region Region'. The 'Email Information' section includes the following fields:

- From:** demouser1 Demo (demouser1@uptake.ca)
- To:** (empty field)
- Cc:** demouser1@uptake.ca;demouser1@uptake.ca
- Subject:** Quote 124977 for Model: 315FL - Customer: DAN EXCAVATING & UNDERGROUND(1697475) Sales Rep: demouser1 Demo
- Details:** Dear ,  
demouser1 Demo  
demouser1@uptake.ca  
Phone: Mobile:  
Dealership

The 'Quote Revision Documents' section contains the following items:

- Quote Worksheet document
- Quote document
- Quote document
- Sale Agreement document
- Sale Agreement document (legal)
- DATA GOVERNANCE CONSENT and TRIAL OFFER - 2017

At the bottom right, there are 'Send' and 'Cancel' buttons. A legend indicates that a red asterisk denotes required fields and a yellow folder icon denotes an internal document. A 'Notes' section provides the following instructions:

- File name shouldn't contain special Char(&,';').
- Use ; for multiple emails.
- Click on the document icon to view the document.
- Click on the check box to attach the document on the email.

The documents displayed will be from the revision selected. Each document icon can be selected for review. You can select each box document from the quote to attach to the email.

After the email is sent, you will have the option to change the status of the quote to Submitted.

# LINKS

## Personalize – Quote Editor

In the **Links** menu, select [**Personalize – Quote Editor**]. This allows users to personalize the cover page of every quote document they create. Making changes to this page will only affect the user.

The screenshot displays the 'Personalize Quote Editor' interface. At the top, there is a navigation bar with 'UPTAKE iQuote' and a dropdown menu for 'Construction (G)'. Below this is a search bar and a 'Personalize Quote Editor' title. The main content area is divided into sections:

- Introduction:** Contains a text area with the text: "Dear {ContactName}, Thank you for this opportunity to quote Caterpillar products for your business needs. We are pleased to quote the following for your purchase consideration."
- Model Name:** Contains a text area with the text: "{MachineStatus} - Quote's machine status, {ModelName} - Quote's machine model"
- Additional Considerations:** Contains a text area with the text: "Delivery is based on manufacturer availability at the time of the order"
- Closing Remarks:** Contains a text area with the text: "We wish to thank you for the opportunity of quoting on your equipment needs. This quotation is valid for 30 days, after which time we reserve the right to re-quote. If there are any questions, please do not hesitate to contact me."
- Quoter Name:** Contains a text area with the text: "Sincerely, {RepName} Machine Sales Representative"

At the bottom, there is a note: "Notes: If you use the Special Tags {..}, iQuote will replace it with the relative value."

You can personalize the following information:

- Introduction
- Model Name
- Closing Remarks
- Quoter Name

**NOTE:** If you want to use the special tag, don't change its name. Otherwise iQuote won't understand it and won't use it.

# ADMIN

## Credit Claims Program Admin

In the **Admin** menu, select [**Credit Claims Program Admin**]. This page allows admins to set up credit claims. The claims can be created to apply to all or specific models for a certain period of time.

The screenshot shows the 'Credit Claims Programs Admin' form. At the top, there's a navigation bar with 'UPTAKE IQQUOTE' and 'Construction (G)'. Below that, a search bar contains 'Look for Quotes with Quote Number that equals In All Divisions Search'. The form has tabs for 'Expired Programs', 'Current Programs', and 'Future Programs'. The 'Current Programs' tab is active. The form fields include:
 

- Type:** A dropdown menu.
- Program No.:** A text input field.
- Program Name:** A large text input field.
- Claim Value:** Radio buttons for '% of List', '% of Net', and 'Amount US\$'. A checked radio button for 'Value for All Base Models' is present.
- Valid Period:** 'From' and 'To' date pickers.
- Sale Type:** Radio buttons for '1-Sold', '2-Sold to Rental/Leasing Company', '3-Rental with Purchase Option', '4-Lease', '5-Rent to Rent', and '6-Rental/Lease Conversion'.
- Customer Type:** Radio buttons for 'Governmental', 'Private', and 'Corporate'.
- Notes:** A large text area for additional information.
- Applies To:** Radio buttons for 'All Base Models' (checked) and 'Selected Base Models'.
- Add:** A button at the bottom left of the form.

## Quote Links Admin

In the **Admin** menu, select [**Quote Links Admin**]. This page controls the links in the Quote Links section of the Common Tasks menu in each quote. The URL could be the location of a file on an FTP server if the system is enabled to do so.





























The screenshot shows the 'Quote Links Admin' table. The table has the following columns: Title, Description, URL, Pass Quote No, and Changed By. There are also 'Add New' and 'Update Orders' buttons at the top right. A single row is visible with the following data:
 

Title	Description	URL	Pass Quote No	Changed By
test	test	google.ca	<input type="checkbox"/>	demouser1 Demo on Oct 26, 2019 11:36 AM

 Below the table, there is a link: [1 link\(s\)](#).

## Manage Users

In the **Admin** menu, select **[Manage Users]**. This page will give access for all users except Sales Reps.

User Administration <span style="float: right;">(Secure)</span>									
Flag	Name	Title	Login Name	Office	Company	Comments	Last Access	Changed By	Add
	<b>Arnold, Tarsha</b>		CloudLink\Eric173				Dec 22, 2017 4:00 PM	Audrey929 on Aug 3, 2016	 
	User Type: Power Users								
	<b>Ayers, Diana</b>	Development Consultant	CloudLink\Frank363		Canam Solutions Inc		Feb 5, 2018 2:08 PM	Danny846 on Jan 25, 2018	 
	User Type: Admins								
	<b>Blevins, Carin</b>		CloudLink\Olivia532				Jul 20, 2017 10:13 AM	Adrian293 on Oct 6, 2007	 
	User Type: Read Only								
	<b>Bonilla, Lorrrie</b>		CloudLink\Tera934				<Never Access>	Jennifer238 on Jun 5, 2017	 
	User Type: Sales Rep								
	<b>Burgess, Desmond</b>		CloudLink\Marcia64				Aug 11, 2017 4:17 PM	hamerd on Oct 17, 2018	 
	User Type: Power Users								
	<b>Cantu, Coy</b>		CloudLink\Zachary341	Bensalem			Jul 21, 2016 1:28 PM	Andrew454 on Jun 29, 2011	 
	User Type: Read Only								
	<b>Charles, Wanda</b>		CloudLink\Vicki637				Mar 27, 2017 4:06 PM	Andrew454 on Jun 29, 2011	 
	User Type: Sales Rep								
	<b>CLMonitor, cloudlinkmonitor</b>		CloudLink\cloudlinkmonitor			Lorem ipsum dolor sit amet	Apr 25, 2019 1:27 PM	demouser2 on Jun 6, 2018	 
	User Type: Admins								
	<b>CLMonitor, cloudlinksoc</b>		CloudLink\cloudlinksoc			Lorem ipsum dolor sit amet	<Never Access>	demouser2 on Jun 6, 2018	 
	User Type: Admins								
	<b>Cole, Erik</b>		CloudLink\Sherry461	Bensalem			Oct 23, 2013 4:20 PM	Jennifer238 on Aug 6, 2013	 
	User Type: Sales Rep								
	<b>Cordova, Brendon</b>		CloudLink\Janette84				Dec 5, 2017 10:36 AM	Mindy560 on Nov 21, 2014	 
	User Type: Admins								
	<b>Daniels, Leslie</b>		CloudLink\Eugene771				Sep 11, 2016 11:17 PM	Eugene771 on Sep 6, 2007	 
	User Type: Admins								

User levels:

Admins:

- View and edit all quotes
- Reopen closed quotes (that are in Won, Lost or No Deal Status)
- Add and edit standard packages
- Able to access the Report – Outstanding, Credit Claims Program Admin, Quote Links Admin options in the Admin menu

Power users:

- View and edit all quotes

Read only:

- View all quotes

The user admin checkbox will give the user access to this screen and allow them to manage users in iQuote. They will have the ability to add a new user or edit the user to change their access level or edit/add comments.

## Manage Reservation Recipients

In the **Admin** menu, select **[Manage Reservation Recipients]**. Users on this list will receive a copy of the email that is sent when a new reservation is requested. See the **New Reservation** section for more information.

UPTAKE IQQuote Construction (G) Rates for Dealership Region Region Shipping to Branch00 demouser1 Demo			
Quotes	Standard Packages	BHL TH CCE TTT WL TTL HEX MG TRK WTS 800 WT MC&G SCOM ACOM UCOM LAP PAV FRSTR USDNC NONCU Admin Links	
Look for Quotes with Quote Number that equals In All Divisions Search			
Manage Reservation Recipients			
User Name	User Email	Entered by	Add New Delete
demouser1 Demo	demouser1@uptake.ca	demouser1 Demo on Oct 19, 2019 05:01 PM	

## Manage Extras

In the **Admin** menu, select **[Manage Extras]**. This page allows users to manage the default values of global extras. Even though a value is entered on the admin page, it can be overwritten in the Model Config section of each family and model.

UPTAKE IQQuote Construction (G) Rates for Dealership Region Region Shipping to Branch00 demouser1 Demo						
Quotes	Standard Packages	BHL TH CCE TTT WL TTL HEX MG TRK WTS 800 WT MC&G SCOM ACOM UCOM LAP PAV FRSTR USDNC NONCU Admin Links				
Look for Quotes with Quote Number that equals In All Divisions Search						
Manage Extras						
Extra	Type	Extra Value Type	Extra Value	Labor Rate/Hr	Changed By	Save All
PDI	System by Model	Amount	US\$ 0		hamerd Demo, 11/17/2019 7:27 PM	Save
SEA Activation	System by Model	Amount	US\$ 0		hamerd Demo, 11/17/2019 7:27 PM	Save
SOS	System by Model	Amount	US\$ 0		hamerd Demo, 11/17/2019 7:27 PM	Save
Manuals	System by Model	Amount	US\$ 0		hamerd Demo, 11/17/2019 7:27 PM	Save
Fuel	System by Model	Amount	US\$ 0		hamerd Demo, 11/17/2019 7:27 PM	Save
Rev.Fan	System by Model	Amount	US\$ 0		hamerd Demo, 11/17/2019 7:27 PM	Save
Block Heater	System by Model	Amount	US\$ 0		hamerd Demo, 11/17/2019 7:27 PM	Save
Radio	System by Model	Amount	US\$ 1500		hamerd Demo, 11/17/2019 7:27 PM	Save
Insurance	System by Model	Amount	US\$ 0		hamerd Demo, 11/17/2019 7:27 PM	Save
Antifreeze and Handling	System by Model	Amount	US\$ 0		hamerd Demo, 11/17/2019 7:27 PM	Save
Storage	System by Model	Amount	US\$ 0		hamerd Demo, 11/17/2019 7:27 PM	Save
Electric Worktool Control	System by Model	Amount	US\$ 0		hamerd Demo, 11/17/2019 7:27 PM	Save
Freight to Customer	System by Model	Amount	US\$ 0		hamerd Demo, 11/17/2019 7:27 PM	Save

## Attachment FPC to Base Model Mapping

In the **Admin** menu, select **[Attachment FPC to Base Model Mapping]**. This page allows the user to choose which base model attachment to use as a template when quoting any inventory attachment in that family.

Family	Base Model Attachment	Changed By	Save All
AG TRACTOR	WT-800	demouser2 Demo, Mar 22 2019 9:30AM	Save
ART DUMP TRUCK			Save
ASPHALT PAVER			Save
ATTACHMENTS	Inventory	Marie Middleton, May 24 2016 12:12PM	Save
AUGER			Save
BACKHOE LOADER	WT-BHL	Marie Middleton, May 24 2016 12:06PM	Save
BARBER GREEN			Save
CHALLENGER			Save
COMPACT WHEEL LOADER			Save
COMPACTION MACHINE			Save
COMPACTOR/LANDFILL COMP			Save
GRADALL			Save
HAMMER			Save
INT TOOLCARRIER			Save
LOGGER			Save
MINI HYDRUALIC EXCAVATOR			Save
MISC			Save
MOTOR GRADER	WT-MG	hamerd Demo, Nov 17 2019 7:25PM	Save
OFF-HWY TRUCK			Save
PAVING/COMPACTION EQ			Save
PIPELAYER			Save
PLANER			Save
SCRAPER			Save
SCREENING PLANT			Save
SKID STEER ATTACHMENTS			Save

**NOTE:** If you choose to configure iQuote to work this way, Uptake Support staff must implement this change for you. Contact Uptake Support at [support@uptake.com](mailto:support@uptake.com).

