



Pre-Delivery Installation (PDI) Instruction Manual

Table of Contents

Table of Contents.....	1
Introduction.....	2
Security Access	3
Launch Page.....	4
Printing a Truck Installation.....	10
Completing a Truck Installation	12
Installation Inquiries	18
Printing Management Reports	23
Appendix A - Error Code Description	27
Appendix B - PDI System Use Cheat Sheet.....	28

Introduction

The Pre-Delivery Installation application utilizes web-based technology, accessible through the Internet, via the Hyster USA Website. This system provides the users, i.e. sales coordinators, service and warranty personnel, with the ability to create truck installation documents and reports, based on information which exists in the Hyster system. It is easy to access and makes the truck installation process easier at the dealer level, while creating more legible documents.

The PDI Process: *(*Note: A PDI is also known as a Signature Sheet, a Delivery Report, an Installation Sheet or a Pre Delivery Sheet). The Installation process has not changed, but the method of entering an installation has changed.*

- Enter Installation Information on the PDI Server.
- Print Three Copies of the PDI Form.
- Deliver the Truck and Obtain the Customer's Signature on the PDI Form.
- Complete the Installation by entering the actual Installation Date on the PDI System.
- Send a copy of the Signed PDI Form to Hyster.

*(*Note: A copy of the Installation (PDI) form must be sent to Hyster before Warranty Claims against the truck will be processed for payment.*

Security Access

1. Go to the HysterUSA home page (displayed below) and Select Dealer Logon to Logon to the Digital Dealer.



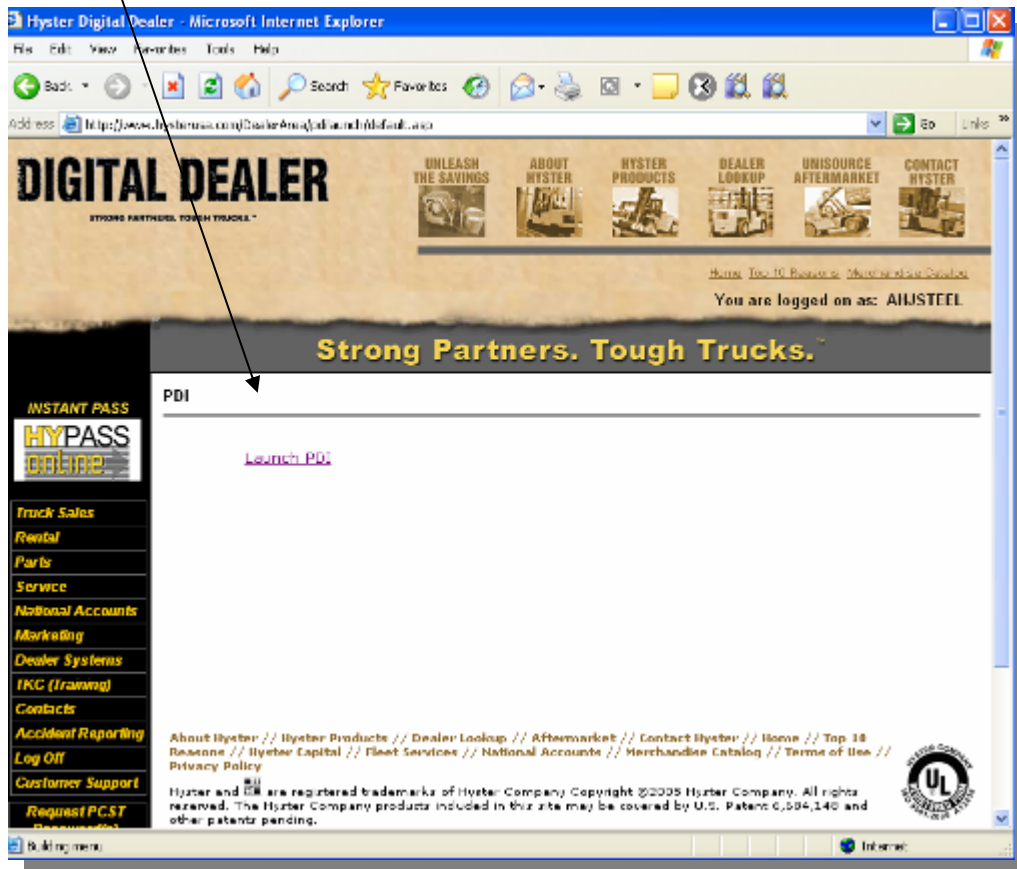
Select Truck Sales or Service from the Menu on the left . Then select **“Report Truck Installations”** located on the dropdown list



Note: Local PC security tools such as “Pop-up blockers” may prevent access to the menu. Please allow access to: [“http://www.hysterusa.com/”](http://www.hysterusa.com/) to avoid future problems. (To allow popup blockers on this site, While logged on to Hyster USA, From the Menu across the top of the screen, Click on Tools, Popup Blocker/Settings. Copy the Hyster USA URL into the Address of Web Site to Allow field. Then select Add. Then Close.)

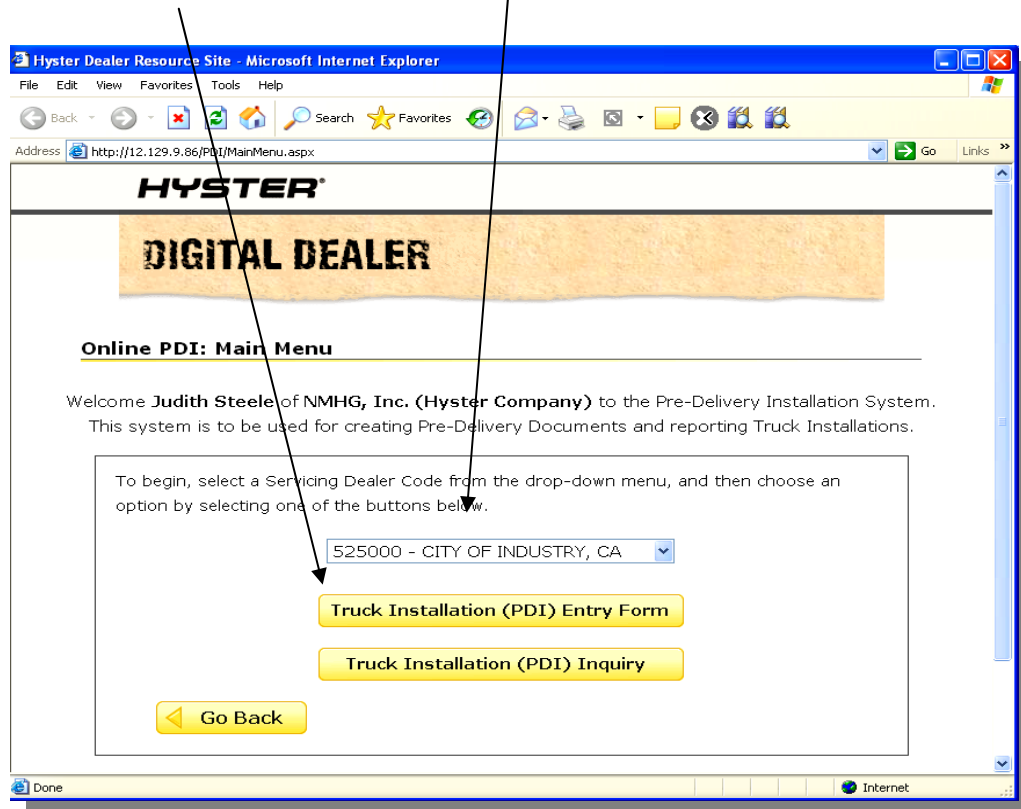
Launch Page

After selecting “Report Truck Installations”, the system will display the following page. Click on the “Launch PDI” link:



Entering a Truck Installation

From the PDI Main Menu, select the **Servicing Dealer Code** from the dropdown box, which represents the dealer location responsible for the customer service of the truck being installed, and then click on “**Truck Installation Entry Form**” button:



Note: If you do not see the correct servicing dealer code in the dropdown list, please contact your D3 system administrator to have the required dealer code added to your profile.

The system returns with the PDI Entry Prompt, where you should “**Select the Installation Type**” (Customer, Rental, Stock, Demo, or Pre-Owned) from the dropdown list.

Then, populate the “**Serial #**” field by either entering a truck serial # if the “Select a Serial #” field is blank or use the dropdown list to view all of your dealerships uninstalled trucks, and then click on the “**Continue**” button.

The screenshot shows a web browser window titled "Hyster Dealer Resource Site - Microsoft Internet Explorer". The address bar shows "http://12.129.9.86/PDI/EntryPrompt.aspx". The page features the "HYSTER" logo and a "DIGITAL DEALER" banner. Below this is the "Online PDI: Entry Prompt" section. A header bar contains the text: "MARKETING GROUP 011 | JOHNSON LIFT - HYSTER | SERVICING DEALER CODE: 525000 | CITY OF INDUSTRY, CA". The main content area contains the following text: "First, select an installation type. Next enter a truck serial number or select one from the drop-down list. Then click the 'Continue' button to proceed." Below this text are two dropdown menus. The first is labeled "Select Installation Type:" and has "S - STOCK" selected. The second is labeled "Select a Serial #:" and has "A230N04144C" selected. Below the second dropdown is a link: "[Click Here to Enter a Serial #]". At the bottom of the form are two buttons: "Go Back" and "Continue".

Please Note: If completing a National Account truck installation and the Serial Nbr you wish to submit an installation for is not in the drop down, please click on the “**Click Here to Submit a National Account Installation**” link and enter the serial number information.

The system will display the following information; you should validate the displayed data. Modify and enter new data as needed to complete the PDI document. Remember, any field name followed by an asterisk (*) is required.

Hyster Dealer Resource Site - Microsoft Internet Explorer

Address: http://112.129.9.86/PDI/Entry.aspx

Validate displayed data. Modify and enter new data as needed to complete the PDI document.
Print 3 copies of the PDI for the Factory, Dealer, and Customer.

Customer Information

Customer Name:* NA:

[\[Click Here to Enter a Customer Name\]](#)

Customer Address:*

City:* State/Province:* Zip/Postal:*

SIC Code:* County Code:*

[\[Click Here to Enter a SIC Code\]](#) [\[Click Here to Enter a County Code\]](#)

Customer Contact

First Name: Last Name:

The customer information has been extracted from the truck order, please verify the accuracy of this information and make any necessary changes. Select an **SIC (Standard Industry Code) code** from the dropdown list, if one is not displayed and a County Code. (Note: if you know the actual codes, you can enter them by selecting the "Click Here to enter a SIC Code" or "Click Here to Enter a CountyCode" options.

SHOE REPAIR SHOPS [7251]
SHOE STORES [5661]
SHORT TERM BUSI CREDIT IN [6153]
SHORT,MARG,EDB OIL NEC [2079]
SIGNS AND ADVERT DISPLAYS [3993]
SILVER ORES [1044]
SILVERWARE PLATED WARE [3914]
SKILLED NURSING CARE FACI [8051]
SMALL ARMS [3484]
SMALL ARMS AMMUNITION [3482]
SOAP AND OTHER DETERGENTS [284]
SOCIAL SERVICES [8399]
SOFTWOOD VENEER AND PLYWO [24]
SOIL PREP SERVICES [0711]
SOYBEAN OIL MILLS [2075]
SOYBEANS [0116]
SPEC DIES AND TOOLS [3544]
SPEC OUTPT FACILTS,NEC [8093]
SPEC TRDE CONTRACT NEC [1799]
SPECIAL INDUSTRY MACHINRY [3555]
SPECIAL PROD SAWMILLS NEC [2425]
SPECIAL WAREHOUSING, NEC [4226]
SPECIALTY CLEANING POLISH [2842]
SPECIALTY HOSP EXCEPT PSY [8069]
SPEED CHANGERS INDUSTRIAL [356]
SPORTING AND ATHLETIC GDS [3940]
SPORTING AND REC CAMPS [7032]
SPORTING GDS, BICY STORES [5941]
SPORTING,RECREATNL GDS,SUP [505]
SRIVE IN PICTURE THEATERS [7833]
SELECT SIC CODE...

Enter the **First and Last Name** of the Customer Contact, remembering to click the “**Save**” button to save your changes.

The screenshot shows a web browser window titled "Hyster Dealer Resource Site - Microsoft Internet Explorer". The address bar shows "http://12.129.9.06/PDI/Entry.aspx". The page content includes instructions: "Validate displayed data. Modify and enter new data as needed to complete the PDI document. Print 3 copies of the PDI for the Factory, Dealer, and Customer." Below this is a "Customer Information" section with fields for Customer Name (dropdown menu showing "COBY ELECTRONICS CORP - RANCH"), NA (text field), Customer Address (text field showing "2805 E ANA ST"), City (text field showing "RANCHO DOMINGUEZ"), State/Province (dropdown menu showing "CA - CALIFORNI"), Zip/Postal (text field showing "90221"), SIC Code (dropdown menu showing "ABRASIVE PRODUCTS [3291]"), and County Code (dropdown menu showing "LOS ANGELES [037]"). There are links for "Click Here to Enter a Customer Name", "Click Here to Enter a SIC Code", and "Click Here to Enter a County Code". Below this is a "Customer Contact" section with "First Name" and "Last Name" text fields. At the bottom are "Go Back" and "Save" buttons. Arrows from the instruction text point to the "First Name" and "Last Name" fields, and the "Save" button.

Remember to also enter the hour meter, travel miles, and travel hours into the system.

Continue down the form, adding or modifying the information. If you need to add dealer installed options or serialized components, Enter the first option in the field provided and then click on the “Add Another Option...” to enter additional option line items.

The screenshot shows a web browser window titled "Hyster Dealer Resource Site - Microsoft Internet Explorer". The address bar shows "http://112.129.9.86/PDI/Entry.aspx". The form contains the following sections:

- Dealer Installed Options/Accessories:** Includes fields for "Option:" and "Description:", and a link "[Add Another Option...]".
- Dealer Installed Serialized Components:** Includes fields for "Type:", "Description:", and "Serial #:", and a link "[Add Another Component...]".
- Truck Configuration - [Expand]**
- Factory Installed Serialized Components - [Expand]**
- Select a PDI Form Type:** Includes radio buttons for "Standard" (selected) and "1-8 Ton".

At the bottom of the form are four buttons: "Go Back", "Save", "Delete", and "Print PDI Forms".

Insure that you select a PDI form type, and when your finish updating the form, remember to click the “**Save**” button.

This screenshot is similar to the previous one, but an arrow points to the "[Expand]" link next to the "Truck Configuration" section header.

To view the truck configurations or Installed Components, click on the “**Expand link**”. To collapse the options displayed, just click on the “**Collapse link**”.

Likewise, to view the Factory Installed Serialized Components, click on the second “**Expand link**”. To collapse the components displayed, just click on the “**Collapse link**”.

Printing a Truck Installation

To print the installation sheet, click on the “Print PDI Forms” button.

The screenshot shows a web browser window titled "Hyster Dealer Resource Site - Microsoft Internet Explorer". The address bar displays "http://12.129.9.86/PDI/Entry.aspx". The main content area contains several sections:

- Dealer Installed Options/Accessories**: Includes input fields for "Option:" and "Description:", and a link "[Add Another Option...]".
- Dealer Installed Serialized Components**: Includes input fields for "Type:", "Description:", and "Serial #:", and a link "[Add Another Component...]".
- Truck Configuration**: A link "[Expand]".
- Factory Installed Serialized Components**: A link "[Expand]".
- Select a PDI Form Type**: Radio buttons for "Standard" (selected) and "1-8 Ton".

At the bottom of the form, there are four buttons: "Go Back", "Save", "Delete", and "Print PDI Forms". An arrow points to the "Print PDI Forms" button.

Note: Only after you have printed the truck signature sheet will a “Continue” button be available which will allow you to complete /submit the installation.

The system display the PDI in an Adobe pdf format.

The top screenshot displays a 'PRE-DELIVERY CHECK LIST' form. It includes sections for:

- I. FLUID LEVELS AND LUBRICATION:** Engine Oil, Hydraulic System Fluid, Battery Acid, Engine Fluid, Differential Oil, Transmission Oil Level, Hydraulic System Oil, General Lubrication, Mast Lubrication, Leaks.
- II. ASSEMBLY AND ADJUSTMENTS:** Tire Inflation (Cold), Front End Light Alignment, Electrical Connections and Wires, Air Cleaner-Hose Connections, Hood Latch Adjustment, Mast Incline and Retention, Mast Latch and Release Stud, Mast Locking Pins, Attachment Adjustments.
- III. EQUIPMENT:** Tilt Barriers Correct, Unit Markings (Customer Name, Operator's Name, etc.), Load Capacity Extension, Operator Restraint, Machine Name, Machine Labels, U.I. Labels, Warning.
- IV. OPERATIONAL AND FUNCTIONAL:** Power, Performance, Fuel, Oil and Grease, Hydraulic System, PTO, PTO No., Directional Control, Brakes Service and Park, Interlocks, Indicator Lights and Sounds, Horns, Attachment.
- CUSTOMER DELIVERY SERVICE CHECK LIST:** Review Operating Manual, Explain each item to the customer, Mark each item with an 'X' when complete, Mark for item 'X' when the item is not used.

The bottom screenshot displays a 'PRE-DELIVERY / DELIVERY REPORT' form. It includes fields for:

- DATE DELIVERED:** [Field]
- LEASE SALE RENTAL DEMO:** [Radio buttons]
- UNIT SERIAL NUMBER:** [Field]
- WARRANTY QUOTE NO.:** [Field]
- UNIT CONFIGURATION:** A table with columns for Description, Type, and Serial #.
- CARRIAGE TYPE:** [Radio buttons]
- FORKS:** [Radio buttons]
- ATTACHMENT:** [Radio buttons]
- DEALER INSTALLED OPTIONS OR ACCESSORIES:** [Table with columns for Option, Description, and Serial #]

All of the information entered,

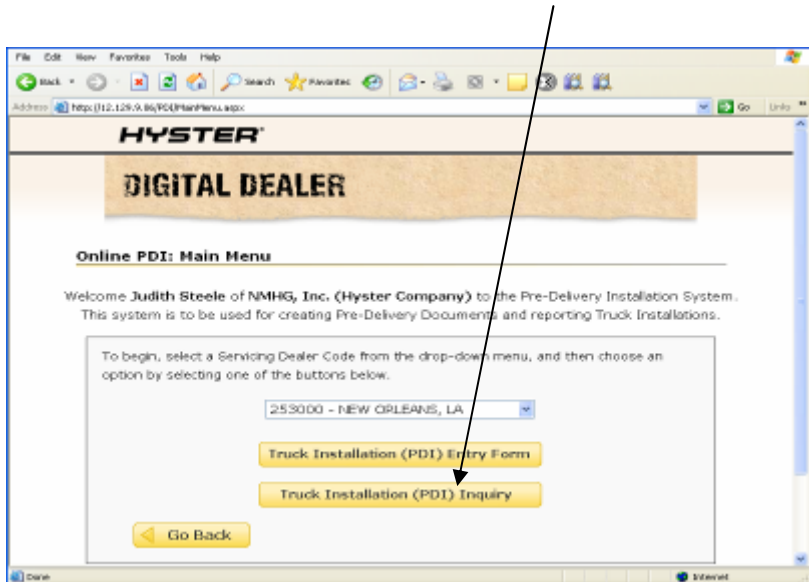
- 1). Serial Number
- 2). Customer Address
- 3). Installation Type
- 4). Dealer Attachments
- 5). Component Serial Numbers

has been populated to this form.

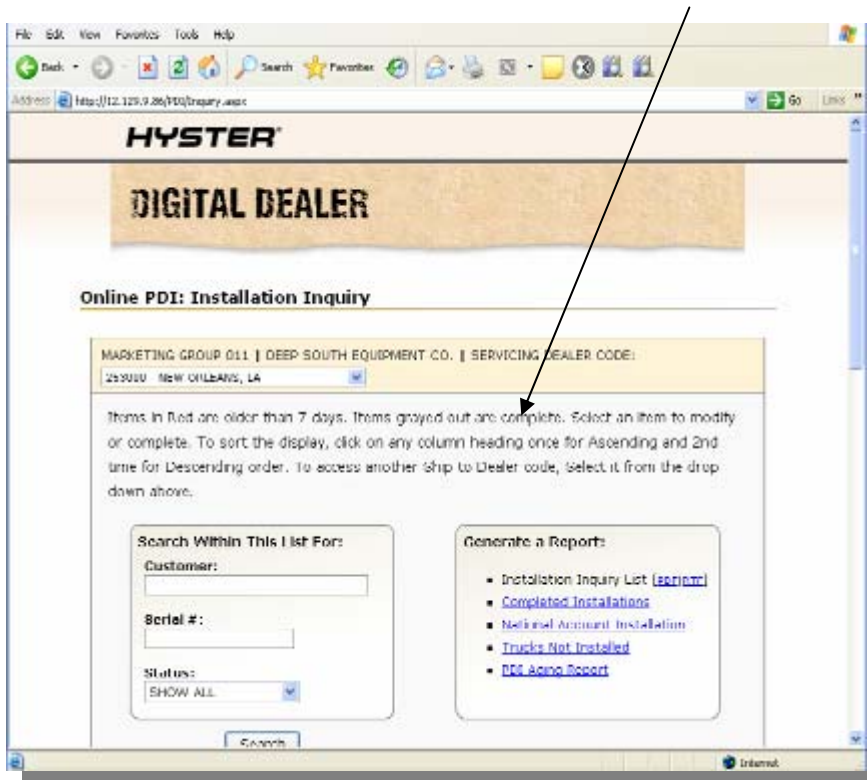
At this point, you have successfully entered the data and displayed the desired installation form. If the form is ok, click on **"Save a Copy"** icon to save the PDF file to your PC or network drive or print the form using the **"printer icon"**.

Completing a Truck Installation

From the PDI Main Menu, select the “Truck Installation Inquiry” button:



The system returns the following information; note the comment at the top of the webpage



*“Items in Red are older than 7 days. Items grayed out are complete or locked due to an error condition.. Select an item to modify or complete. To sort the display, click on any column heading once for Ascending and 2nd time for Descending order. To access another **Servicing** Dealer code, select it from the drop down above. “*

That comment refers to the lower portion of the webpage display:

Serial #	Creation Date	Last Changed	Type	NA	Customer	Status	Error
B218N08601C	8/11/2006	10/9/2006	C		NORTHROP GRUMMAN SHIP	X	NW00931
D174N03219D	11/15/2006	11/15/2006	C		P&O PORTS LOUISIANA	I	Delete
F114N01517D	8/8/2006	8/11/2006	P		TYLER PIPE INDUSTRIES	I	Delete
F187V06918D	8/9/2006	8/9/2006	S		DEEP SOUTH RENTAL FLEET	I	Delete
F187V06919D	8/9/2006	8/9/2006	C		P&O PORTS LOUISIANA	X	
L005V08521D	8/11/2006	8/11/2006	C		TYLER PIPE INDUSTRIES	X	
L005V08698D	8/8/2006	8/8/2006	S		NORTHROP GRUMMAN SHIP	X	
L177B08512D	8/11/2006	8/11/2006	S		P&O PORTS LOUISIANA	I	Delete
L177B08538D	8/9/2006	8/9/2006	C		P&O PORTS LOUISIANA	P	Delete
L177B08544D	8/9/2006	8/9/2006	C		P&O PORTS LOUISIANA	I	Delete
L177B08547D	8/8/2006	8/11/2006	C		P&O PORTS LOUISIANA	P	Delete

To sort the display, click on any **column heading** once for Ascending and 2nd time for Descending order.

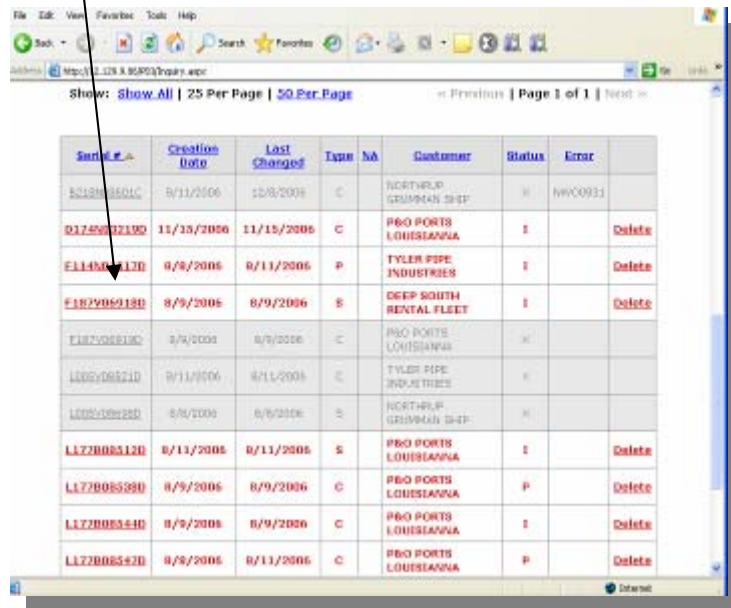
If you place your mouse over any of the status or types or error codes displayed, a description of each will also display:

Status Codes: I = Incomplete
P = Printed
X = Complete
C = Acknowledged

Types: C = Customer
R = Rental
S = Stock
D = Demo
P = PreOwned

Error Msgs: See Appendix A

Click on the truck “**Serial #**” that is to be completed:

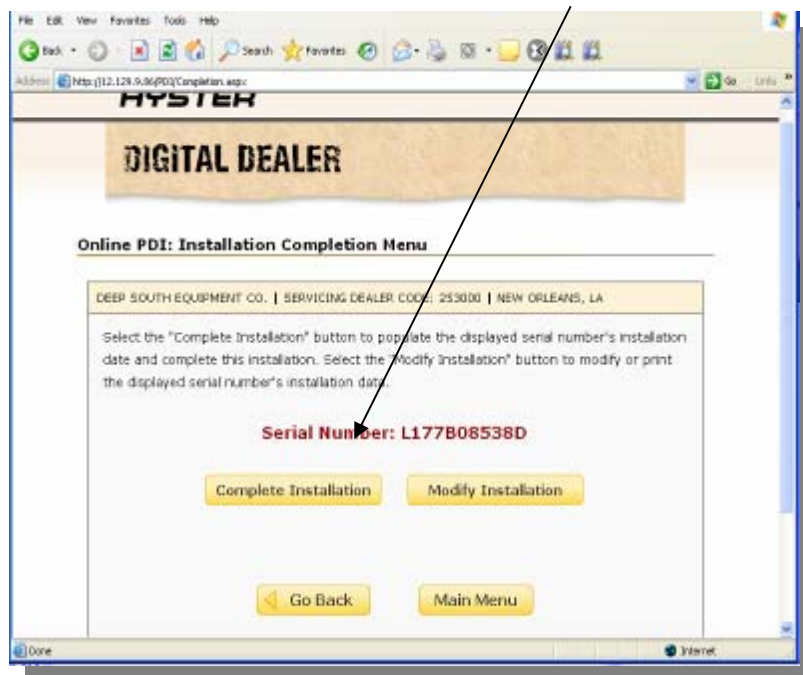


The screenshot shows a web browser window displaying a table of truck records. The table has columns for Serial #, Creation Date, Last Changes, Type, NA, Customer, Status, and Error. An arrow points to the 'Serial #' column header. The table contains several rows of data, including records for NORTHROP GRUMMAN SHIP, PRO PORTS LOUISIANA, TYLER PIPE INDUSTRIES, and DEEP SOUTH RENTAL FLEET.

Serial #	Creation Date	Last Changes	Type	NA	Customer	Status	Error
8312815501C	8/11/2006	12/8/2006	C		NORTHROP GRUMMAN SHIP	R	NEW00931
01745032100	11/13/2006	11/15/2006	C		PRO PORTS LOUISIANA	I	Delete
F114061120	8/8/2006	8/11/2006	P		TYLER PIPE INDUSTRIES	I	Delete
F1829069180	8/9/2006	8/9/2006	S		DEEP SOUTH RENTAL FLEET	I	Delete
F182906919C	8/9/2006	8/9/2006	C		PRO PORTS LOUISIANA	R	
L005065210	8/11/2006	8/11/2006	C		TYLER PIPE INDUSTRIES	R	
L005065220	8/8/2006	8/9/2006	S		NORTHROP GRUMMAN SHIP	R	
L1720065120	8/11/2006	8/11/2006	S		PRO PORTS LOUISIANA	I	Delete
L1720065280	8/9/2006	8/9/2006	C		PRO PORTS LOUISIANA	P	Delete
L1720065440	8/9/2006	8/9/2006	C		PRO PORTS LOUISIANA	I	Delete
L1720065470	8/9/2006	8/11/2006	C		PRO PORTS LOUISIANA	P	Delete

Note: You can also delete a record (prior to submission to Hyster) by clicking on the “Delete” link.

From the Installation Completion Menu, select the **“Complete Installation”** button:



From the Installation Completion Menu, complete the **“Installation Date”** by clicking on the Calendar icon and selecting the date the truck was installed at the customer site. *Note: The installation date cannot be greater than today's (current) date.* Enter the **Customer Contact First** and **Last Name** if blank.



. Click the **“Submit”** button.

The system will display the following **"Processing"** message while the system validates the information entered on the Hyster warranty system:

Online PDI: Installation Date Prompt

All required fields must be completed and valid. Required fields are labeled in red italics and high

Processing...

MARKETING GROUP 011 | DEEP SOUTH EQUIPMENT CO. | SERVICING DEALER CODE: 253000 | NEW ORLEANS, LA

Enter the date the truck was installed at the customer site. Enter the name of the person at the customer site who signed the installation document.

Serial Number: L177B08538D

Installation Date: * 12/13/2006

Customer Contact First Name: * JUD

Customer Contact Last Name: * SMITH

Go Back Submit

This reminder message will appear **once the submission is complete**:



Click the **"OK"** button.

If an installation record already exists, then the PDI system will advise you that a pre-owned installation type must be submitted.

File Edit View Favorites Tools Help

Address http://192.129.9.86/PDI/DatePrompt.aspx

Online PDI: Installation Date Prompt



This unit has an existing Customer, Rental or Preowned installation. Must be installed as Type PreOwned.
MWO Error Code: MWO0871

MARKETING GROUP 011 | DEEP SOUTH EQUIPMENT CO. | SERVICING DEALER CODE: 253000 | NEW ORLEANS, LA

Enter the date the truck was installed at the customer site. Enter the name of the person at the customer site who signed the installation document.

Serial Number: L177B08538D

Installation Date: * 12/13/2006

Customer Contact First Name: * JUD

Customer Contact Last Name: * SMITH

Go Back Submit

If no error conditions exist, the system will display a message indicating the installation has been successfully submitted to Hyster: (See Appendix A for possible error conditions.)

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Online PDI: Installation Submitted



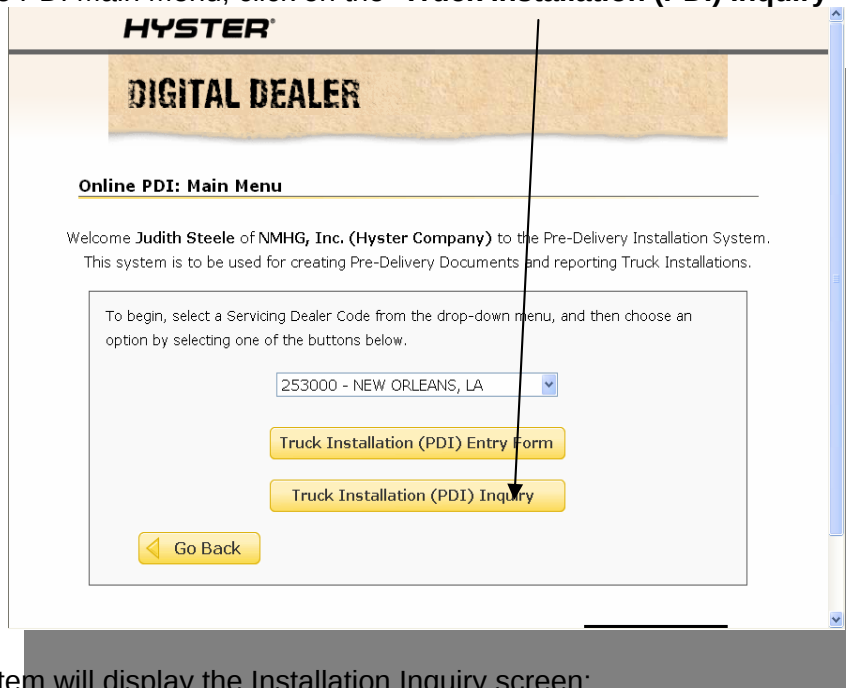
Note: The installation has been successfully submitted to Hyster.

Please send the signed PDI documents to Hyster.
(Documents may be submitted via Email, Fax or US Mail.)

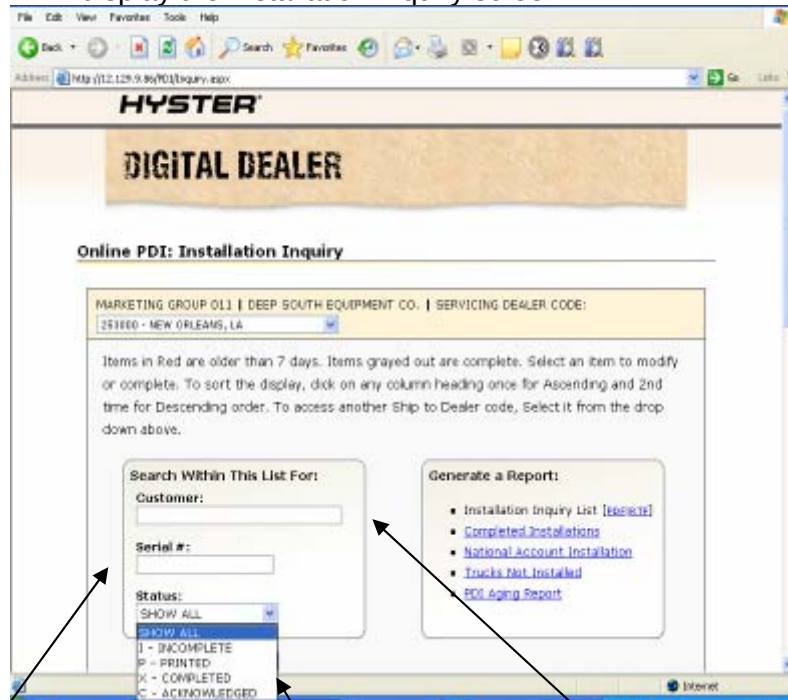
Return to PDI Main Menu

Installation Inquiries

From the PDI Main Menu, click on the “**Truck Installation (PDI) Inquiry**” button:



The system will display the Installation Inquiry screen:



Search options are available to reduce the number of records viewed and save time. You can search using the displayed search filters. For example, filter for a specific type of installation by selecting the desired type from the drop down. **or** a specific Customer by entering (Cosco*) **or** a specific Serial # by entering D174* (Note: Wild cards “*” are allowed on Customer And Serial # searches)

Scroll to the bottom of the screen, where you can view truck installation records entered by your dealership: Your display options for this page are: **Show All**, **Show 25 Per Page**, or **Show 50 Per Page**, click the appropriate link if you want to display something other than the default (Show All).

You can also **sort** the columns on the page; defaults are always in Ascending order. Click the heading once for ascending sort, click again for descending sort. An **arrow** located near the column heading you are sorting will indicate the direction of the sort.

Serial #	Creation Date	Last Changed	Type	NA	Customer	Status	Error
B218N08601C	8/11/2006	12/8/2006	C		NORTHROP GRUMMAN SHIP	X	NWO0931
D174N03219D	11/15/2006	11/15/2006	C		P&O PORTS LOUISIANA	I	Delete
F114N01517D	8/8/2006	8/11/2006	P		TYLER PIPE INDUSTRIES	I	Delete
F187V06918D	8/9/2006	8/9/2006	S		DEEP SOUTH RENTAL FLEET	I	Delete
F187V06919D	8/9/2006	8/9/2006	C		P&O PORTS LOUISIANA	X	
L005V08521D	8/11/2006	8/11/2006	C		TYLER PIPE INDUSTRIES	X	
L005V08598D	8/8/2006	8/8/2006	S		NORTHROP GRUMMAN SHIP	X	
L177B08512D	8/11/2006	8/11/2006	S		P&O PORTS LOUISIANA	I	Delete
L177B08533D	8/9/2006	8/9/2006	C		P&O PORTS LOUISIANA	X	NWO0871
L177B08544D	8/9/2006	8/9/2006	C		P&O PORTS LOUISIANA	I	Delete
L177B08547D	8/8/2006	8/11/2006	C		P&O PORTS LOUISIANA	P	Delete

Please note that entries with a **Status** of "I" (Incomplete) or "P" (Printed) will be highlighted in red if the last change date is older than 7 days from the current date, such as line #1 above. If you place your cursor on either the Type or Status field, the system will display all of the possible values for those fields (i.e. Types = C (Customer), R (Rental), S (Stock), D (Demo), P (PreOwned), and Status = I (Incomplete), P (Printed), X (Completed), and C (Acknowledged).

Entries with a status of "X" (Completed, waiting on an acknowledgment) or "C" (Completed and acknowledged) will appear in gray. These entries can only be printed, not modified.

Click on the desired **"Truck Serial #"** to begin the **inquiry** process.

If you select a serial number with a status equal to "I" (Incomplete) or "P" (Printed), you have the option to modify (change or delete) the record or complete the installation.

The Serial Number we selected for this example had a status of "X" (Completed). *Note A status of "X" indicates a submission did not complete due to an error. If the error is something that can be fixed and another submission of the same type is needed, simply click on "UNLOCK" to make the record available for resubmission.

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Online PDI: Entry Form

MARKETING GROUP 011 | DEEP SOUTH EQUIPMENT CO. | SERVING DEALER CODE: 253000 | NEW ORLEANS, LA | TRUCK SERIAL NUMBER: F187V059100 | INSTALLATION TYPE: CUSTOMER

Validate displayed data. Modify and enter new data as needed to complete the PDI document. Print 3 copies of the PDI for the Factory, Dealer, and Customer.

Unlock

Use Unlock to change the status of this installation back to P and allow modifications for resubmission.

Customer Information

Customer Name:* NA:
P&O PORTS LOUISIANA - NEW ORLEAN
[Click Here to Select a Customer Name]

Customer Address:*

Scroll down the web page to view all the information, print by using the "Print PDI Forms" button at the bottom of the page.

XL1479 CROWN

[Add Another Data...]

Dealer Installed Serialized Components

Type	Description	Serial #
AA	ENGINE/GENERAL MOTOR	FE7890
FE	TRANSMISSION	2345678901234

[Add Another Component...]

Truck Configuration - [Expand]

Factory Installed Serialized Components - [Expand]

Select a PDI Form Type

Standard 1-B Ton

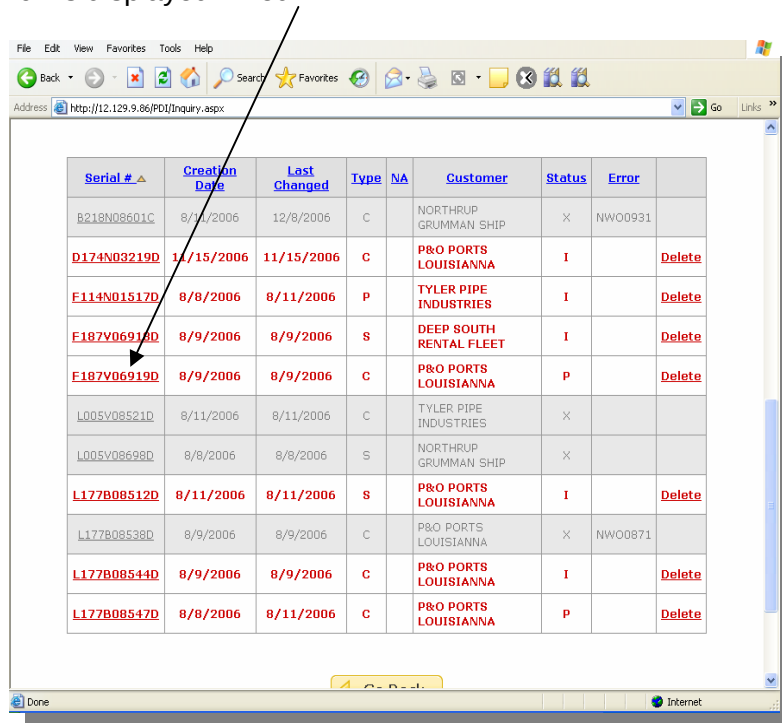
Print PDI Forms

Save Delete Continue

Go Back Main Menu

Items with a status of "I" or "P" are not locked and are available for modification, printing and submission.

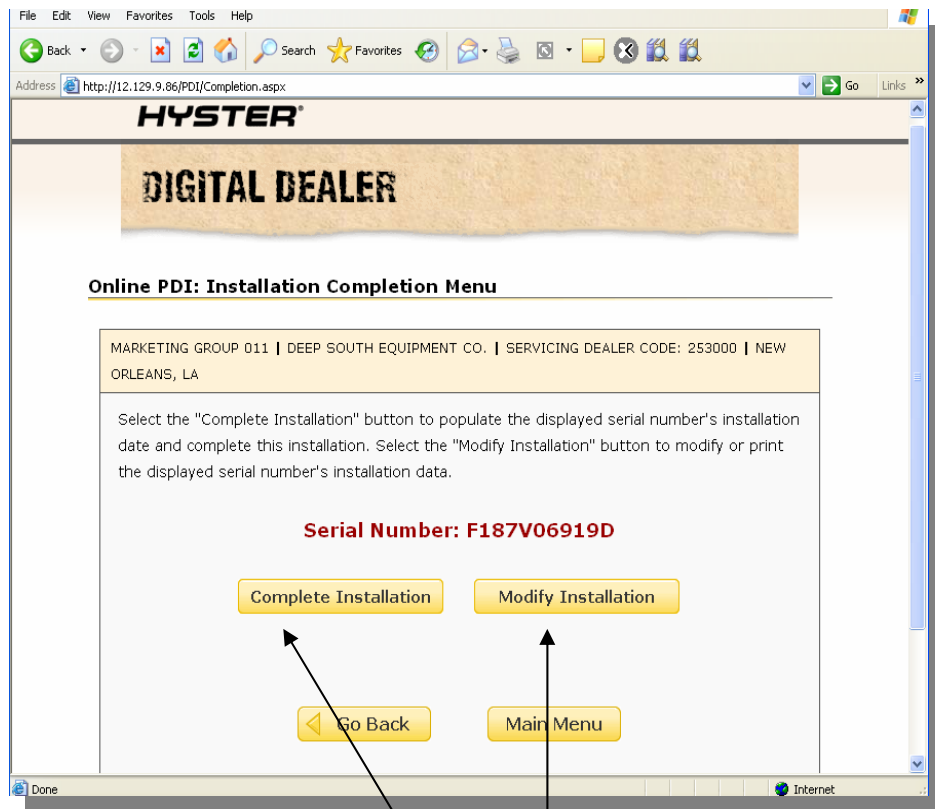
Selecting an item with a Status of "I" or "P" As an example, let's click on the first record, status "P" (Printed), which is displayed in red.



The screenshot shows a web browser window with the address bar displaying "http://112.129.9.66/PDI/Inquiry.aspx". The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The toolbar contains various navigation and utility icons. The main content area displays a table with the following columns: Serial #, Creation Date, Last Changed, Type, NA, Customer, Status, and Error. The table contains 15 rows of data. The first row with status "P" is highlighted in red and has an arrow pointing to it from the text above. The status "P" is also displayed in red in the Status column for this row.

Serial #	Creation Date	Last Changed	Type	NA	Customer	Status	Error
B218N08601C	8/14/2006	12/8/2006	C		NORTHROP GRUMMAN SHIP	X	NW00931
D174N03219D	11/15/2006	11/15/2006	C		P&O PORTS LOUISIANA	I	Delete
F114N01517D	8/8/2006	8/11/2006	P		TYLER PIPE INDUSTRIES	I	Delete
F187V06918D	8/9/2006	8/9/2006	S		DEEP SOUTH RENTAL FLEET	I	Delete
F187V06919D	8/9/2006	8/9/2006	C		P&O PORTS LOUISIANA	P	Delete
L005V08521D	8/11/2006	8/11/2006	C		TYLER PIPE INDUSTRIES	X	
L005V08628D	8/8/2006	8/8/2006	S		NORTHROP GRUMMAN SHIP	X	
L177B08512D	8/11/2006	8/11/2006	S		P&O PORTS LOUISIANA	I	Delete
L177B08538D	8/9/2006	8/9/2006	C		P&O PORTS LOUISIANA	X	NW00871
L177B08544D	8/9/2006	8/9/2006	C		P&O PORTS LOUISIANA	I	Delete
L177B08547D	8/8/2006	8/11/2006	C		P&O PORTS LOUISIANA	P	Delete

The system displays the following:

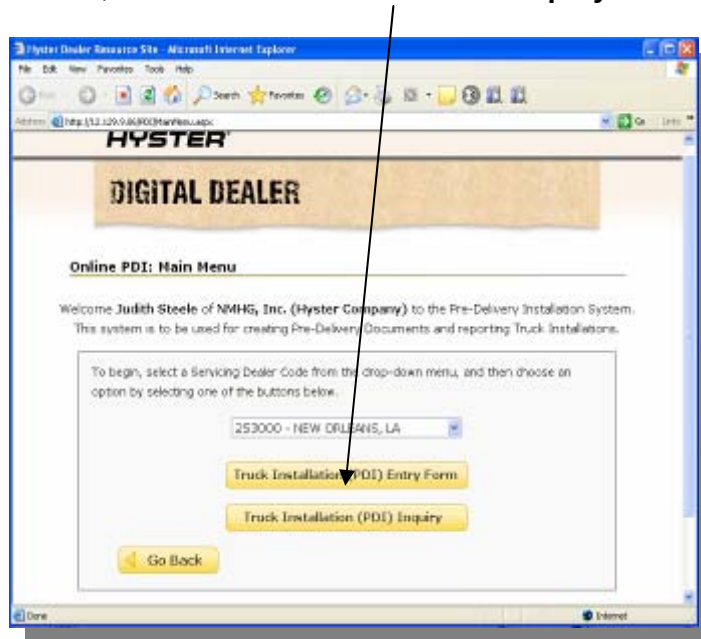


If you want to complete the installation of this truck, *i.e. you've printed the forms and delivered the truck to the customer*, click on the **"Complete Installation"** button and then following the instructions in the documentation listed for "Completing an Installation", beginning on page 20.

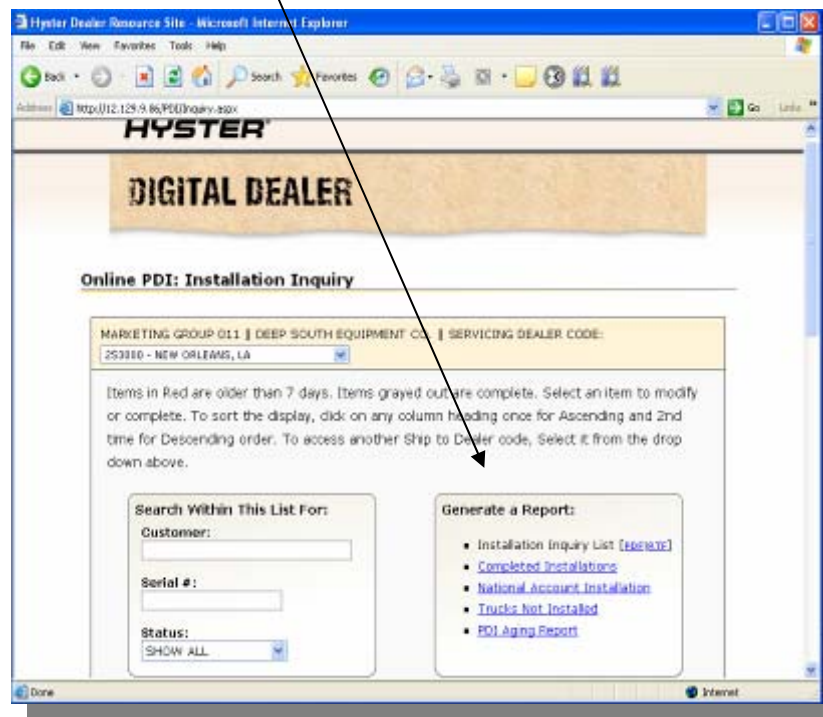
To modify the installation, click on the **"Modify Installation"** button. The system displays the PDI Entry Form: Modify the form as desired and print or submit or save it for future use.

Printing Management Reports

From the PDI Main Menu, select the **“Truck Installation Inquiry”** button.



From the report section (upper right corner), select the desired report option (i.e. Installation Inquiry List, Completed Installations, National Account Installation, Trucks Not Installed, or PDI Aging report).



For our example, we'll utilize the Trucks Not Installed report.

File Edit View Favorites Tools Help

Back * Forward * Home * Search * Favorites * Print * Mail * Run * Stop * Reload * Go

Address: <http://112.129.9.86/PDI/ReportPromp.aspx>

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DIGITAL DEALER

Options for "Shipped-Not-Installed Trucks" Report

Filters

Servicing Dealer Code:
[Check All](#) | [Check None](#)
☒ 293000 - NEW ORLEANS, LA
☐ 293010 - SHREVEPORT, LA
☐ 293020 - JACKSON, MS

Customer Name: [Check All](#) | [Check None](#)
☒ ABG MEATS INC
☒ A.J.E.R.T.
☒ APPE

Sorting
Sort By: NONE ☐ Asc ☐ Desc

Select the desired **Filters** such as the Servicing Dealer Codes and/or Customer Names.

Select how you would like to sort the report using up to three sorting levels. Select desired sorts from the dropdown lists for each field located in the **Sorting** section. You are not required to select any sorts.

File Edit View Favorites Tools Help

Back * Forward * Home * Search * Favorites * Print * Mail * Run * Stop * Reload * Go

Address: <http://112.129.9.86/PDI/ReportPromp.aspx>

Sorting
Sort By: CUSTOMER NAME ☐ Asc ☐ Desc
Then By: LOCATION ☐ Asc ☐ Desc
Then By: SHIP DATE ☐ Asc ☐ Desc

Report File Format
☐ PDF ☐ RTF

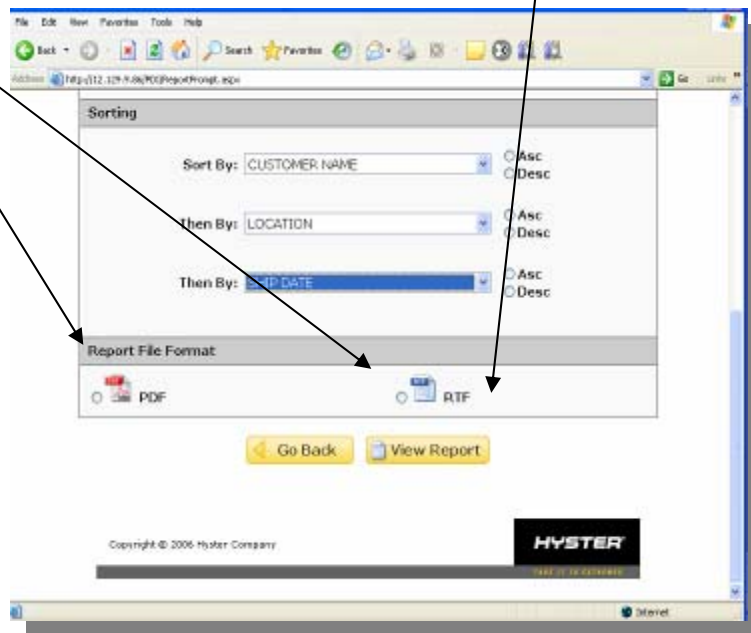
[Go Back](#) [View Report](#)

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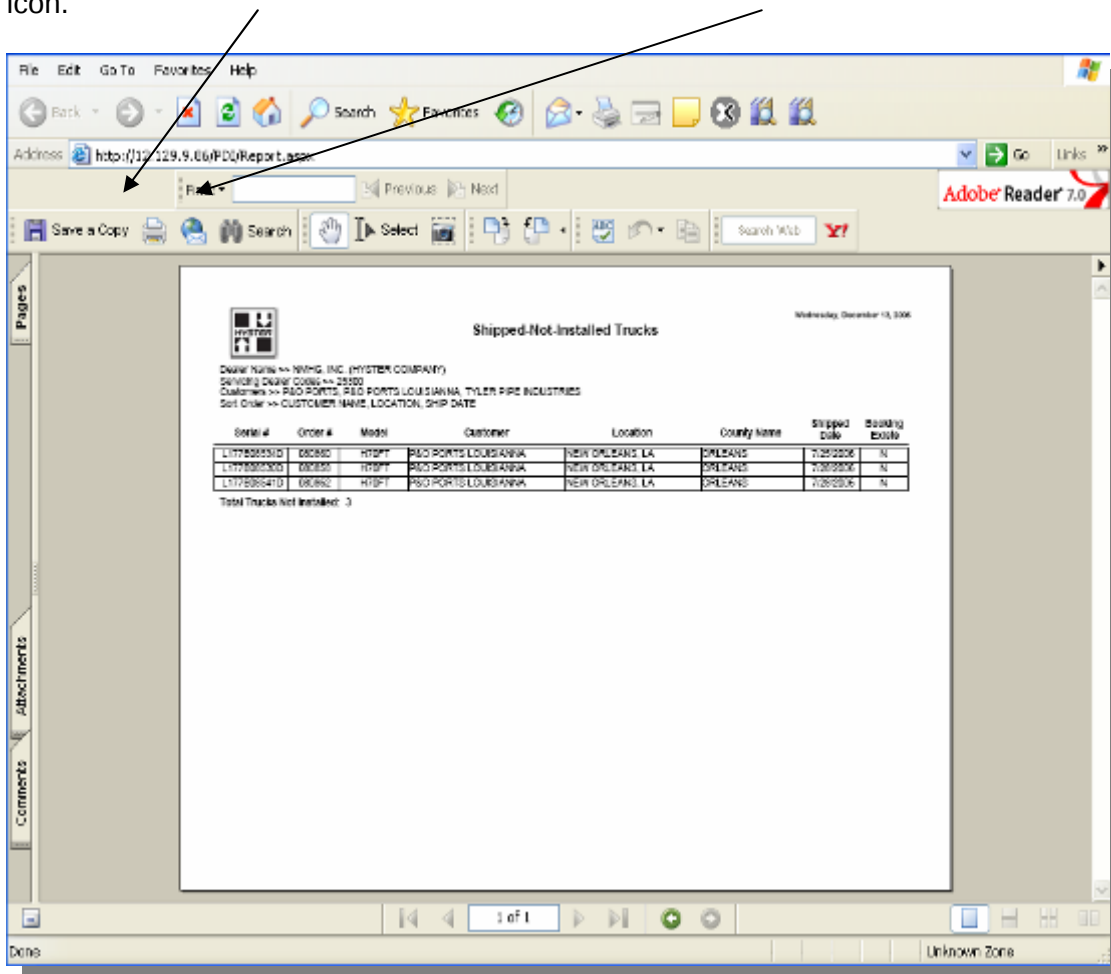
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EQUIPMENT FOR THE FUTURE

Select the desired format of the report, i.e. Adobe pdf (*Recommended*) or Rich Text Format by clicking on the radio button, and then selecting **“View Report”**. (*Rich Text is only recommended if the document information is to be downloaded to Excel or Access.*)



From the displayed report, you can either **"Save a Copy"** or print the report using the **"Printer"** icon.



Appendix A - Error Code Description

Code	Long Description
NWO0784	Dealer Code Supplied Not the Owner or Delivering Dealer of the Truck- Ownership Transfer Required
NWO0582	Invalid Unit Serial #
NWO0783	Unit Serial # Not Present on Sales Order
NWO0469	UserID not in NOMS security file
NWO0842	User not authorized to DlrCode on Installation (NOMs Security Table does not contain that dlr code for that UserID).
NWO0841	User not authorized to use Marketing Group on Installation (NOMS Security Table does not contain that marketing group for that UserID)
NWO0496	A prior Installation exists for this Unit for which no Signature Sheet has been received.
NWO0522	Installation Date cannot be a future date.
NWO0931	Retail Booking Required.
NWO0848	Model Code Not Found.
NWO1105	Report Date Greater Than 30 days - No changes Allowed.
NWO0871	This unit has an existing Customer, Rental or Preowned installation. Must be installed as Type PreOwned.
NWO0495	Another completed installation exists for this unit with today's date.
NWO5000	SIC Code submitted for customer not found on N.W.O. SIC code file.
NWN0358	Truck is not Pre-Owned
NWO1254	Installation records are not found for the truck.
NWN0361	Returned for any condition invalid numeric or date data.

Appendix B - PDI System Use Cheat Sheet

Use this system to Enter Installations, Print PDI Installation Documents, Complete Installations and Run Management Reports.

Logon to the Dealer Area of the Hyster USA Website.

Select **Service or Truck Sales**

Select **Truck Installations**.

Entering a Truck Installation

From the PDI Main Menu:

Select **Servicing Dealer Code**

Select **Truck Installation Entry**

From the PDI Entry Prompt:

Select **Installation Type**

Select or Enter a Serial Nbr (**Note, If a National Account, Select Submit a National Account Installation*)

Select **Continue**.

If message response displayed is **No Matching Installation found** or something else that is acceptable to you, Select **Continue**.

From the PDI Entry Form:

Fill in **any missing or incorrect information**. (**Note – Required field labels contain an **)

Add **any Dealer Installed Options and/or Serialized components**

Save **the installation**

Printing a Truck Installation

Once the required fields have been filled in, the option to print will display.

Select **the proper form type** –

1-8 ton is to be used for Fortis trucks.

Standard for all other types.

Select **Print PDI Forms**

To Print the displayed form Either Select **the Printer Icon** OR Select **File, Print from the Menu** at the top of the screen.

Completing a Truck Installation

From the PDI Main Menu

Select **Truck Installation Inquiry**

From the Installation Inquiry Screen

Double Click on the **Truck Serial number** line item that is to be completed.

From the Installation Completion Menu

Select **Complete Installation**

From the Installation Completion Menu

Click on the **Calendar Icon** to select the **Installation Date**.

Enter **Customer Contact First and Last Name** if Blank.

Select **Submit**

Verify **the Resulting display**.

Installation Inquiries (Use this selection to Modify, Print, Complete Installations or Run Reports)

From the PDI Main Menu

Select **Truck Installation Inquiry**

From the Installation Completion Menu

Double Click on the **desired Truck Serial number** line.

Select **Modify or Complete Installation**

Printing Management Reports (Use this selection to print Reports of PDI Server Installations)

From the PDI Main Menu

Select **Truck Installation Inquiry**

From the Installation Completion Menu in the Generate Report Section (Upper Right Corner)

Select **Desired Report**

From the Report Options Screen

Select **Filters, Date and Sort Options** or leave as is to accept defaults.

Select **Report File Format** (**Note RTF should only be used if data is to be exported to a*

Microsoft

Application like Excel or Access.)

Select **View Report**

The Report can be Saved to your PC, Printed, or E-Mailed by selecting the appropriate ICON.



End of Documentation