

Hyster Electronic Retail Organizer HERO

USER INSTRUCTIONS

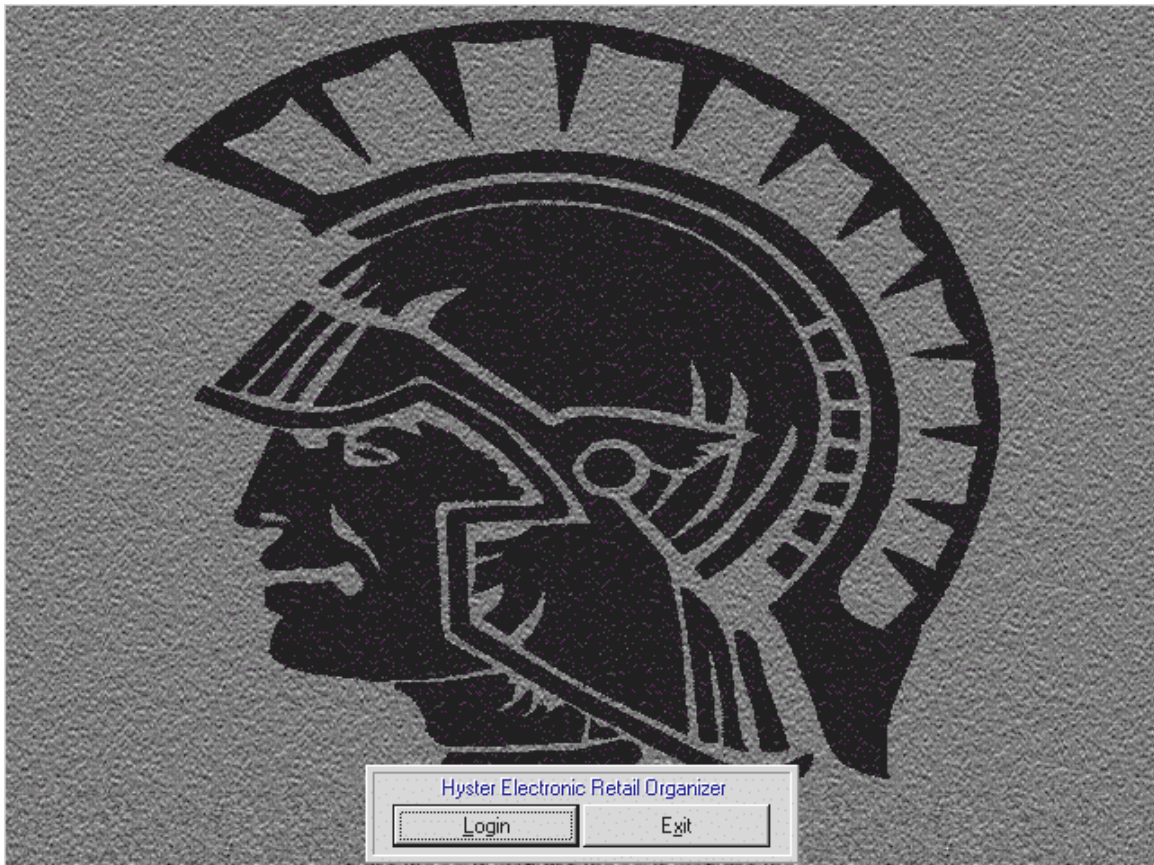


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HERO MAIN MENU:

Each HERO signon will always bring you to this main Quote screen.

Xmit	Quote #	Customer	Cust City	St	Parent Co.	Eff Date	Exp Date
	F10000	A NEW CUSTOMER	OMAHA	NE		03/05/98	04/04/98

From the **MENU** bar you can go to File, Function, Quotes, ITA, Reports and Utilities.

From the **ICON** bar you can go to Quotes, Orders, Customers, SC's, Financial Worksheets, Model Templates, SPED Quotes, Dealer Item Table, Hyster Slide Show, Update, New, Delete, Print, and Exit functions.

The functionality varies for Update, New, Delete, and Print functions depending on which summary screen is being displayed (Quotes, Orders, Customers, SC's).

The PRINT function will print the summary grid lists.

GENERAL HERO FUNCTIONALITY:

MOST SCREEN GRIDS HAVE COMMON SORT AND SEARCH CAPABILITY

SORT:

To re-sort the grid into a *single* different sequence:

- ⌚ Click on the Column Header

OR

- ⌚ mouse click on any data line of the column to be sorted
- ⌚ then click on the “Sort” button.

To re-sort the grid into *multiple* column sorts:

- ⌚ first click the “Multi” button
- ⌚ then mouse click on any data line of *each* column to be sorted, in sequence desired
- ⌚ then click on the “Sort” button.

SEARCH:

To search for a specific value:

- ⌚ mouse click on any data line of the column to be searched
- ⌚ type the value to search for in the lower left-hand data box

(Note - Use the “*” wildcard character for a partial search, i.e.:

HYS* will search for occurrences that have HYS as first 3 letters in the string

HYS will search for all occurrences with HYS contained anywhere in the string)

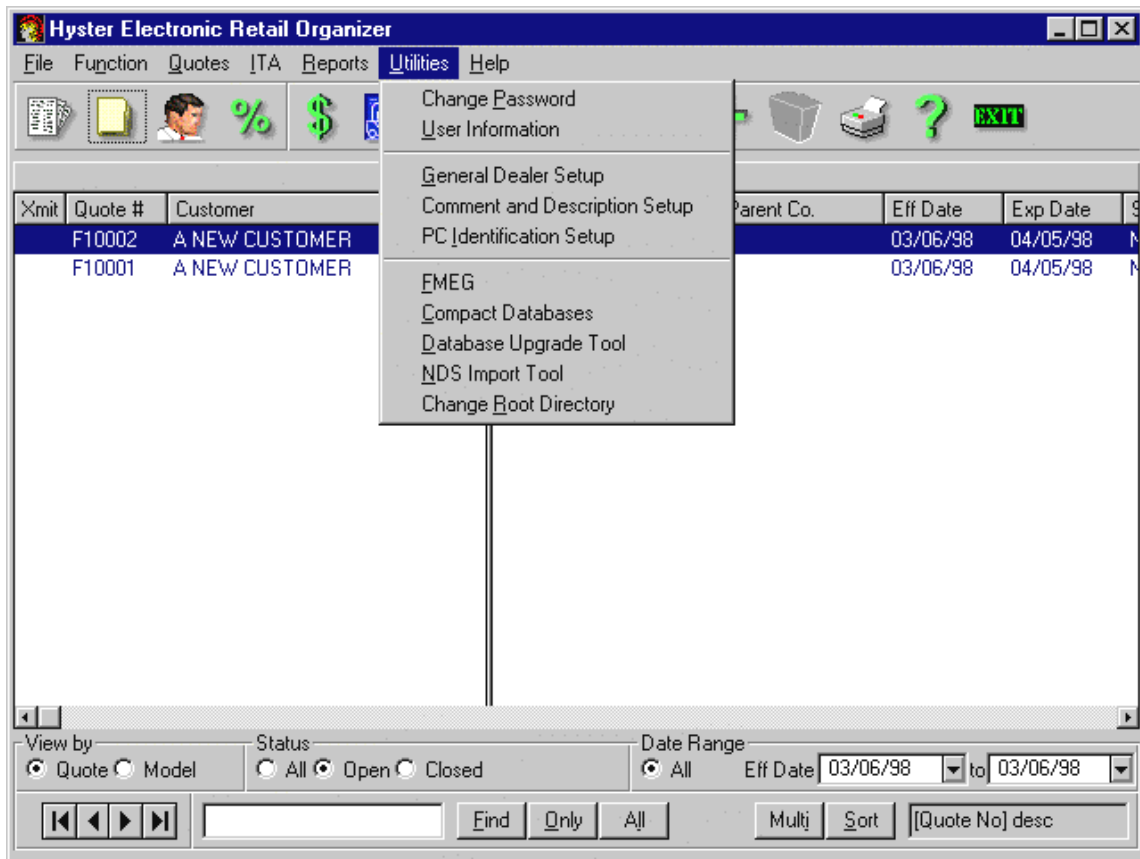
- ⌚ click the “Find” button to find the *first* occurrence of the search value
- ⌚ click the “Only” button to display only records containing the search value

Please Note: When entering in text information, such as a Customer Name, do not use the single quote character (‘) that is found on the double quote character key. Using this character can cause problems in HERO and HEROLINK. Use the apostrophe character (`) located under tilde (~) character.

RECORD APPROVAL FUNCTION:

- ⌚ Orders and Special Commitment Discount requests must be approved before being transmitted to NOMS.
- ⌚ Authority to approve is issued within the User Table and is controlled at the Dealer System Administrator level.
- ⌚ The approval process requires the user’s password entry for any authorized user to each function.
- ⌚ Once a transaction is approved, it is queued for transmission to NOMS.
- ⌚ Until the next connection to NOMS occurs, a record can be selected and “Un-approved” which opens the record back up for further HERO processing.
- ⌚ Once updating is completed, each record will need to be “re-approved” which will again queue it for transmission to NOMS.

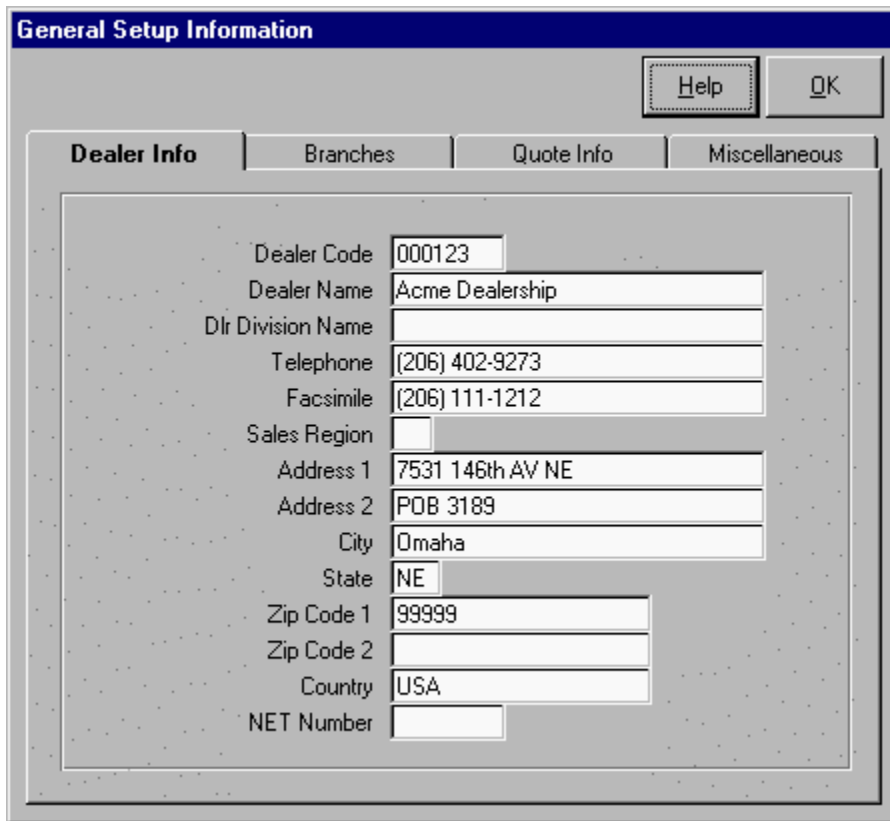
UTILITIES MENU:



These functions are available from the Utilities menu:

- ⌚ Change Password -- User ability to change a password when needed
- ⌚ User Information -- Maintain HERO Users, with Passwords and Sales Representative numbers
- ⌚ General Dealer Setup
- ⌚ Comment and Description Maintenance
- ⌚ PC Identification Setup
- ⌚ FMEG -- Access FMEG Software
- ⌚ Compact Databases
- ⌚ Database Upgrade Tool
- ⌚ NDS Import Tool
- ⌚ Change Root Directory -- ability to change root directory of HERO and its databases

**GENERAL DEALER SETUP:
DEALER INFORMATION:**



The image shows a software dialog box titled "General Setup Information". It has a blue title bar and a grey background. In the top right corner, there are two buttons: "Help" and "OK". Below the title bar, there are four tabs: "Dealer Info", "Branches", "Quote Info", and "Miscellaneous". The "Dealer Info" tab is currently selected. The main area of the dialog contains a list of fields for dealer information, each with a text input box. The fields and their values are: Dealer Code (000123), Dealer Name (Acme Dealership), Dlr Division Name (empty), Telephone ((206) 402-9273), Facsimile ((206) 111-1212), Sales Region (empty), Address 1 (7531 146th AV NE), Address 2 (POB 3189), City (Omaha), State (NE), Zip Code 1 (99999), Zip Code 2 (empty), Country (USA), and NET Number (empty).

Field	Value
Dealer Code	000123
Dealer Name	Acme Dealership
Dlr Division Name	
Telephone	(206) 402-9273
Facsimile	(206) 111-1212
Sales Region	
Address 1	7531 146th AV NE
Address 2	POB 3189
City	Omaha
State	NE
Zip Code 1	99999
Zip Code 2	
Country	USA
NET Number	

Use to maintain Dealership name and address information.

**GENERAL DEALER SETUP
BRANCH MAINTENANCE:**

Branch #	Branch Name
100	PLATTE FALLS
200	FARGO
300	OMAHA
*	

Use this screen to maintain the different Sales Branch locations for a dealership.

In the National Account version of HERO, a decision has not been made on whether to show Westmont and Iselin as Branch locations for ease in reporting.

GENERAL DEALER SETUP

QUOTE DEFAULT MAINTENANCE :

The screenshot shows a software window titled "General Setup Information" with a dark blue header. At the top right are "Help" and "OK" buttons. Below the header is a tabbed interface with five tabs: "Dealer Info", "Branches", "Quote Info" (which is selected), "Miscellaneous", and "NDS Export". The "Quote Info" tab contains a table with two columns: "Quote Terms" and "Default". The table lists several terms, with "Net On Invoice" circled in red and its corresponding checkbox checked. To the right of the table is a button labeled "Quote Print Defaults". Below the table are three input fields: "Days to Expiration" with the value "30", "Default FOB Location" with the value "Factory", and "Delivery Default" with the value "Will Advise".

Quote Terms	Default
▶ Net 30 Days	☐
Net 45 Days	☐
Net Again	☐
Net On Invoice	☒
Net on Invoice / Lease	☐
*	☐

Days to Expiration: 30

Default FOB Location: Factory

Delivery Default: Will Advise

This area is to set up the Quote information defaults. This information is forwarded to the quote, and will appear as it is entered here, so consideration should be given whether entries should be in UPPER or Mixed case.

You can set the default quote terms by placing check beside appropriate terms.

Quote Print Defaults button: Next page.

GENERAL DEALER SETUP
QUOTE PRINT OPTIONS :

Quote Print Options

Close

Customer Copy Print Options

All None

☐ All Models ☐ Freight from dealer ☐ Freight total ☐ Extended Prices

☒ Double Space ☐ Net selling price ☒ Total selling price ☐ Sales tax

☒ Signature Area ☐ Freight from factory ☐ Lease Information ☐ Trade-in allowance

Total Selling Price Label

Subject to tax or freight

Page Setup

Top Margin (inches) 0.70

Bottom Margin (inches) 0.50

Extra Blank Lines for Letterhead on First Page (10 max) 0

These options are the defaults that will appear when a quote (Customer Copy) is printed. These options can be changed at the quote level if the needs for a particular quote vary from the defaults.

The **Page Setup Top Margin** field applies to all pages of the quote *except* for the first page.

To create a margin for the first page that will allow for a letterhead, use the **Extra Blank Lines for Letterhead on First Page** field. (Note that the maximum entry for this field is 10).

GENERAL DEALER SETUP

MISCELLANEOUS MAINTENANCE :

The screenshot shows a software window titled 'General Setup Information'. It has a blue header bar with the title. Below the header, there are four tabs: 'Dealer Info', 'Branches', 'Quote Info', and 'Miscellaneous'. The 'Miscellaneous' tab is selected and highlighted. In the top right corner of the window, there are 'Help' and 'OK' buttons. The main area of the 'Miscellaneous' tab contains three settings:

- Password Expiration:** A label 'No. of Days Before User Passwords Expire' followed by a text box containing the value '999'.
- Current Exchange Rate:** A label followed by a text box containing the value '1.0000'.
- Auxiliary Program Directory:** A label followed by an empty text box.

This tab allows for setting:

- ⌚ Password expiration – number of days allowed before password must change
- ⌚ Current Exchange Rate - (for Canada. Will default to 1.000 for U.S. dealers)
- ⌚ Auxiliary Program Directory – enter directory where FMEG program is installed. This is used for accessing FMEG from HERO on the Utilities Menu.

**COMMENT AND DESCRIPTION SETUP:
STANDARD COMMENTS MAINTENANCE:**

The screenshot shows a software window titled "Comment and Description Setup" with a standard Windows-style title bar (minimize, maximize, close buttons). In the top right corner of the window are two buttons: "Print" and "OK". Below the title bar is a tabbed interface with three tabs: "Standard Comments" (which is selected), "Custom Option Descriptions", and "Hidden Categories". The "Standard Comments" tab contains a list box with a scroll bar on the right. The list box has a header "Standard Comments" and contains the following items: "Backup Alarm", "Comment 1", "Comment 2", "Comment 3", "Comment 4", and "Comment 5". Each item is preceded by a small right-pointing triangle icon. The list box has a dotted background pattern. To the left of the list box is a vertical gray bar with a small black triangle next to the "Backup Alarm" entry.

This area is to store repetitive text that can then be pulled down into the following areas:

- ⌚ Quote – Model Comments
- ⌚ Quote – Option Comments
- ⌚ Order – Comments
- ⌚ Order – Option Comments

This will be a time saver when there are repetitive comments that need to be included on quotes and orders.

COMMENT AND DESCRIPTION SETUP
CUSTOM OPTION DESCRIPTIONS MAINTENANCE:

Comment and Description Setup

Print OK

Standard Comments **Custom Option Descriptions** Hidden Categories

Custom option descriptions to be used for Quote Print

	Series (or All)	Option Code	Short Description	Long Description
*				

This area allows for entry of custom option descriptions for the Quote print process. These comments will override the technical descriptions of the option supplied by Hyster Company.

COMMENT AND DESCRIPTION SETUP

HIDDEN CATEGORIES MAINTENANCE:

Comment and Description Setup

Print OK

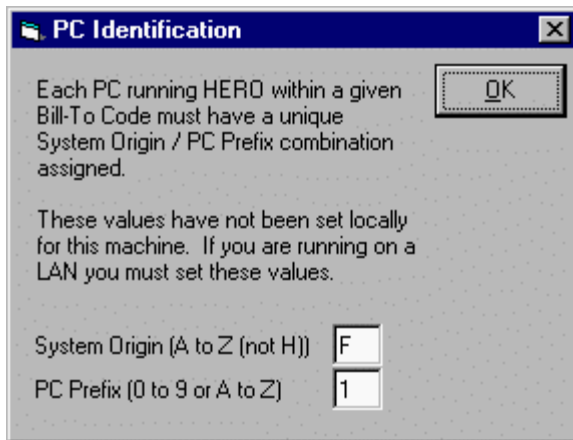
Standard Comments Custom Option Descriptions **Hidden Categories**

Categories to skip during Quote Print

Category Code	
*	

This screen allows for entry of option categories that are to be permanently omitted from the quote print process.

PC IDENTIFICATION:



Each HERO PC within a dealership will need to be set to a different value for System Origin and PC Prefix. These values together will be used as the prefix of the Quote number. PC Prefix will be used as the prefix for Order Request number and SC Request number. This was done to insure unique quote and order numbers between PC users and eliminate record deadlocks when running in a LAN environment.

For LAN users, PC Prefix should be a different value for each workstation PC.

NOTE: Once the values originally created or changed, you must exit the system and sign back on for the new values to take effect.

USER INFORMATION:

The 'User Administration' window has a title bar and a menu bar. Below the menu bar, there are radio buttons for 'All Users' (selected) and 'Sales Reps Only', and buttons for 'Ownership', 'Help', and 'OK'. A table lists users with columns for User ID, Salesrep #, Full Name, Password, and Last Chg. Below the table is a section for 'Privilege settings for system administrator' with a grid of checkboxes for various system functions.

User ID	Salesrep #	Full Name	Password	Last Chg
system administrator		David Stepien	*~?ÁÄÖÖÖÖÖ	03/01/2001
MEF		Myron Foor	*µÜÜÜ×ÖÖÖÖÖ	03/05/98
CAB		Cheryl Bretz	¼¿²-ÜÜ×ÖÖÖÖ	03/05/98
SH		Sally Hogsett	@ÜÜÜ×ÖÖÖÖÖÑ	03/05/98
Sales Rep 1	0001	Sales Rep 1	~1288*8ÄÖÑÐ	03/05/98
Sales Rep 2	0002	Sales Rep 2	@@W++WÄÖÖÑ	03/05/98
*				

Privilege settings for system administrator:

☒ Approve Quotes	☒ Create Order from Quote	☒ Edit Dealer Setup
☒ Approve Order Requests	☒ Create SC Request	☒ Edit Dealer Options
☒ Approve SC Request	☒ Create New Customer	
	☒ Reprice Quotes	☒ Print Management Reports
	☒ View Financial Info	☒ View All Salespeople
		☒ System Administrator

Use to establish all users of the HERO system. One key user at each Host Dealer location should be established as the system administrator with overall administration duties and capabilities. Users who are sales reps should be assigned a rep code. The password is encrypted for security reasons after it is entered. The various privilege settings determine access to specific parts of the HERO system.

Note: Salesman and Branch systems must have **View All Salespeople** selected to allow ability to assign Customers to SC's and SPED Quotes.

Use the radio button selection to view **all users** or only those coded as **sales reps**.

The **Ownership** button will display statistics for a sales rep as to number of customers, orders, quotes, and SC's.

CHANGING SALES REPS:

To assign a new sales rep to an existing sales territory:

- ⌚ Delete the sales rep code from the existing user id. Tab to next line.
- ⌚ A message will appear asking if you want to delete that sales rep code from all assigned customer records. Reply **NO**.
- ⌚ A message will then remind you to be sure and re-assign that sales rep code to a new user id.
- ⌚ Once that re-assignment is done, all customer records assigned to the new sale rep will automatically show the new user id name where sales rep name is shown.

CHANGE PASSWORD:

The screenshot shows the 'Change Password' dialog box within the 'Hyster Electronic Retail Organizer' application. The dialog box has a title bar with 'Hyster Electronic Retail Organizer' and 'Change Password'. It contains a 'Help' button, 'OK' button, and 'Cancel' button. Below these is a section titled 'RULES FOR PASSWORDS' with the following text: 'Passwords must be changed at least every 999 days.', '32 Unique passwords are required before reuse.', 'Passwords must be at least 6 character long.', 'Passwords must not be longer than 10 characters.', 'The user ID cannot be part of the password.', 'No more than 2 repeating adjacent characters are allowed.', and 'Any 3 adjacent characters of the old password can not appear in the same position of the new password.' Below the rules are three input fields: 'Old Password:', 'New Password:', and 'Verification:'. The background shows a list of items with columns 'Xmit', 'Quote #', and 'C'. The bottom of the window has a 'View by' section with radio buttons for 'Quote', 'Model', 'All', 'Open', and 'Closed'. There are also date range selectors for 'Eff Date' and 'to', and a search bar with 'Find', 'Only', 'All', 'Multi', 'Sort', and '[Quote No] desc' buttons.

Hyster Electronic Retail Organizer

Change Password

Help OK Cancel

RULES FOR PASSWORDS

- Passwords must be changed at least every 999 days.
- 32 Unique passwords are required before reuse.
- Passwords must be at least 6 character long.
- Passwords must not be longer than 10 characters.
- The user ID cannot be part of the password.
- No more than 2 repeating adjacent characters are allowed.
- Any 3 adjacent characters of the old password can not appear in the same position of the new password.

Old Password :

New Password :

Verification :

View by: ☒ Quote ☐ Model ☐ All ☒ Open ☐ Closed ☒ All Eff Date MM/DD/YY to MM/DD/YY

[Quote No] desc

A user can change the HERO password at any time using this screen. User must enter old password, the new password and retype the new password in the verification box to assure correct spelling.

FMEG FUNCTION ACCESS:

Select FMEG from the Utilities menu to access the FMEG software without having to exit the HERO system.

Note: Before executing this selection you must enter your FMEG Program Directory in the Auxiliary Program Directory Field of the Dealer Setup Miscellaneous tab. **Only the Windows version of FMEG can be accessed from HERO.**

COMPACT DATABASES:

Use this function to compact the databases, which will maintain system efficiency. You will automatically be prompted to compact databases with each NOMSLINK connection. This screen has been provided as a manual way to trip the database compacting process.

DATABASE UPGRADE TOOL:

New HERO releases beginning with version 5.5.3 include automated database upgrade functionality. This function is available for maintenance by Hyster support personnel.

DATABASE ARCHIVE TOOL:

Use this function to archive Orders, Special Commitments, SPED Quotes and Quotes to historical database. **Note:** This functionality is only available at Host system and Administrator level access.

RESTORE FROM ARCHIVE:

Use this function to restore archived data to production database for inquiry and statistical reporting.

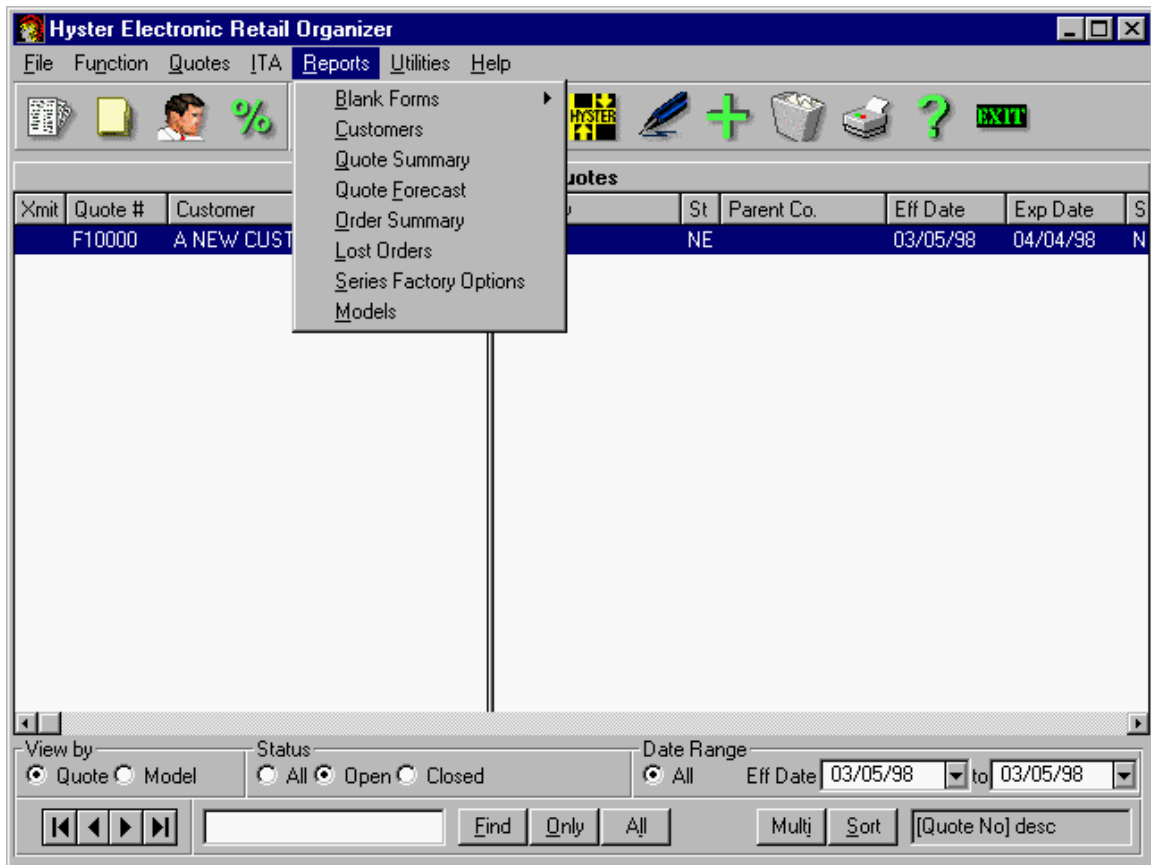
NDS IMPORT TOOL:

This function allows the importing of data from a non-HERO source for the following files:

- ⌚ Customer database (Ship-To Extension table)
- ⌚ Customer Personnel
- ⌚ Customer Fleet information
- ⌚ Dealer Items
- ⌚ Dealer Item Prices

Note: Programming has been completed by NDS to extract data from HDMS software. Non-HDMS users have been provided the file interface specifications for this import function.

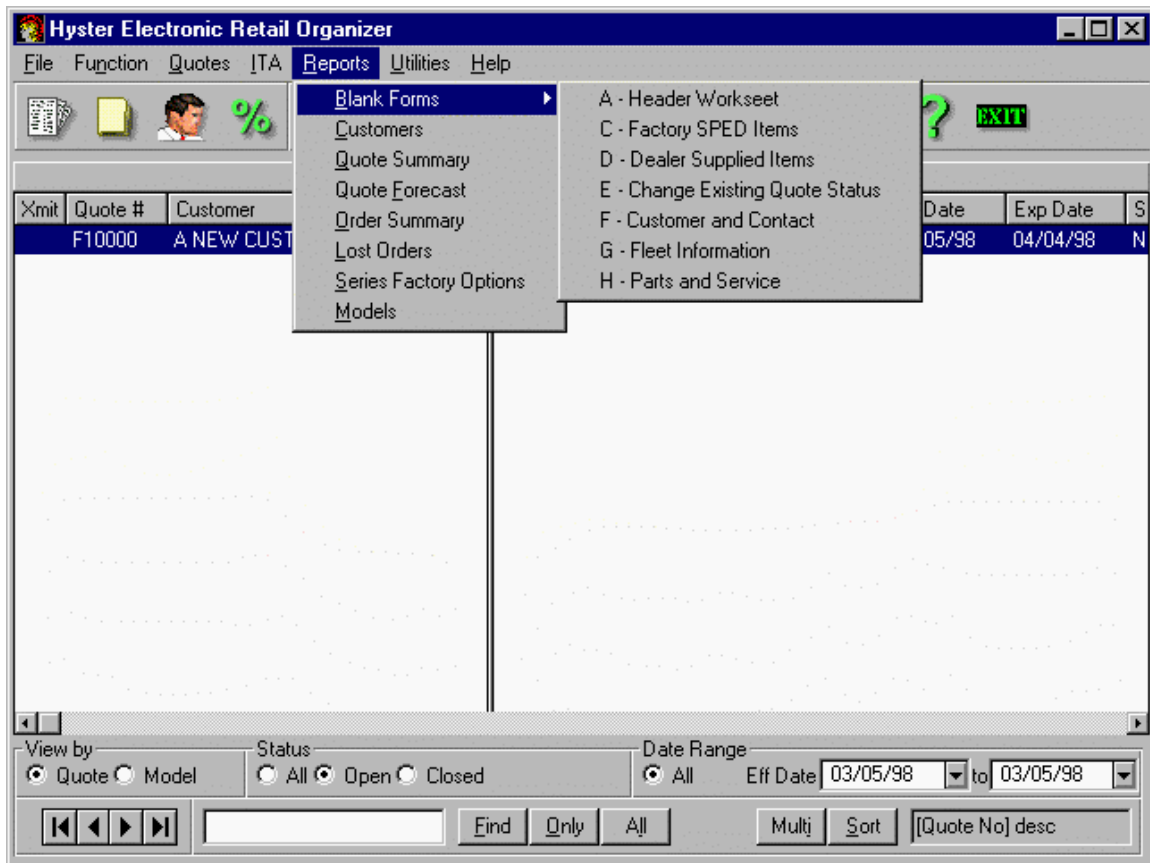
REPORTS MENU:



These functions are available from the Reports menu:

- ⌚ Blank Forms - Forms are based on the Autoquote system and provide paper copies to write up input to HERO.
- ⌚ Quote Summary
- ⌚ Quote Forecast
- ⌚ Order Summary
- ⌚ Lost Orders
- ⌚ Series Factory Options
- ⌚ Models

FORMS & REPORTS:



Use Blank Forms to generate a variety of user forms to use off-line from HERO. Specific reports have been defined for printing. The list of reports will be expanded as HERO is enhanced from its roll out version.

CUSTOMER DATA:

To create a new customer, from the Customer Summary screen, click on the “+” ICON

Click “OK” in the Create New Customer Box

The screenshot shows a classic Windows-style application window titled "Hyster Electronic Retail Organizer". The menu bar includes File, Function, Customers, ITA, Reports, Utilities, and Help. A toolbar at the top left contains icons for creating new records, opening existing ones, saving, printing, and deleting. Below the toolbar is a button labeled "Create New Customer". To the right of this button are "OK" and "Cancel" buttons. The main area of the window is a table with five columns: "Customer #", "Customer Name", "Address Line 1", "City", and "State". The table is currently empty. At the bottom of the window is a status bar containing navigation controls (back, forward, etc.), a search input field, and buttons for "Find", "Only", "All", "Multi", and "Sort". The sort criteria are displayed as "[name], [city]".

Customer Information														
Dealer Customer Number 181000000					Country Code			Area Code		Number				
Name					Phone					OK				
Address					Fax									
Address														
Address														
City					Ship-To Code			Customer						
State					End Cust or Ship-To E			Dealer						
Zip Code														
Country					County									
General Info Personnel Sales Calls Fleet Profile Purch Priorities Parts-Service														
Parent Company					No Parent			Branch						
Standard Industry Code					☐ Out Of Territory									
Company Data					Next Purchase			Sales Rep						
No of Employees 0					MM/DD/YY			Qty 0						
Annual Sales \$0.00								☒ Single Rep ☐ Multiple Reps						
Fleet Size 0					Order Defaults			<table border="1"> <thead> <tr> <th>Rep #</th> <th>Rep Name</th> </tr> </thead> <tbody> <tr> <td>None</td> <td>Not Assigned</td> </tr> </tbody> </table>		Rep #	Rep Name	None	Not Assigned	
Rep #	Rep Name													
None	Not Assigned													
Dunn & Bradstreet #					Rental ? N									
					End Customer ? Y									

Dealer Customer Number is automatically generated by HERO, but can be overwritten to correspond with dealership business system.

The customer data contains General Customer Information along with separate tabs for Personnel, Sales Calls, Fleet Profile, Purchase Priorities, and Parts/Service information.

Each customer needs to be assigned to a Rep code and a SIC code.

Multiple Rep Codes can be assigned within truck class or Allied Equipment.

Assignment of the customer to a Branch can be made if applicable.

Rep and Branch code assignments are not required if a customer name and address record is created for shipments out of territory – indicated by checking the OUT OF TERRITORY box.

Note: New customers can be created and maintained from all tier levels (Host, Branch or Sales Rep PC's).

Tip: Once new customer(s) are created or existing customer(s) modified the user must upload this data via HERO Link. This process will keep all dealership HERO data consistent.

CUSTOMER PERSONNEL:

Customer Information							
Dealer Customer Number		0000000123					
Name	A NEW CUSTOMER						
Address	1234 HERO LANE						
Address							
Address							
City	OMAHA						
State	NE	Zip Code	99999				
Country	USA						
Country Code		Area Code		Number			
Phone							
Fax							
Ship-To Code				Customer			
End Cust or Ship-To		E		Dealer			
County		NEMAHA			127		
General Info		Personnel		Sales Calls		Fleet Profile	
Purch Priorities		Parts-Service					
First Name	Last Name	Salutation	Position	Phone	Fax		
*							

Personnel data. Use bottom scroll bar to reach data fields to the right side.

These entries will become the pull-down menu in the Quote function for the customer contact selection.

CUSTOMER SALES CALLS:

Customer Information	
Dealer Customer Number	0000000123
Name	A NEW CUSTOMER
Address	1234 HERO LANE
Address	
Address	
City	OMAHA
State	NE
Zip Code	99999
Country	USA
Country Code	
Area Code	
Number	
Phone	
Fax	
Ship-To Code	
Customer	
End Cust or Ship-To	E
Dealer	
County	NEMAHA
	127
General Info Personnel Sales Calls Fleet Profile Purch Priorities Parts-Service	
Date Last Call	Comments
*	

Sales call data is free form text usually maintained by the Sales Rep.

FLEET PROFILE:

Customer Information				
Dealer Customer Number		0000000123		
Name	A NEW CUSTOMER			
Address	1234 HERO LANE			
Address				
Address				
City	OMAHA			
State	NE	Zip Code	99999	
Country	USA			
Country Code		Area Code	Number	
Phone				
Fax				
Ship-To Code			Customer	
End Cust or Ship-To		E	Dealer	
County		NEMAHA		127
General Info Personnel Sales Calls Fleet Profile Purch Priorities Parts-Service				
Model Year	Manufacturer	Model	Serial No	On Lease?
Model Year Manufacturer Model Serial No On Lease?				
Add New Model Edit Model Info Delete Model				

Fleet information is displayed in a grid summary format once it is entered. To edit or delete information, click on the desired line of information, then click on the **Edit Model Info** or **Delete Model** button.

To add information, click on the **Add New Model** button.

Add new Fleet Model Profile:

Customer Information										
Dealer Customer Number 0000000123					Country Code			Area Code		Number
Name A NEW CUSTOMER					Phone					OK
Address 1234 HERO LANE					Fax					
Address										
Address										
City OMAHA					Ship-To Code			Customer		
State NE Zip Code 99999					End Cust or Ship-To E			Dealer		
Country USA					County NEMAHA			127		
General Info		Personnel		Sales Calls		Fleet Profile		Purch Priorities		Parts-Service
Model Year 0		On Lease ?				View Fleet Grid				
Manufacturer		ID Number				Date Acquired MM/DD/YY				
Truck Model		ITA Code				Replacement Date MM/DD/YY				
Serial Number		Capacity								
Power Type										
Condition		Mast Info		Attachments						

Fleet profile information is entered here. To return to the fleet grid, press the **View Fleet Grid** button.

PURCHASE PRIORITIES:

Customer Information													
Dealer Customer Number 0000000123					Country Code			Area Code		Number		OK	
Name A NEW CUSTOMER					Phone								
Address 1234 HERO LANE					Fax								
Address													
Address													
City OMAHA					Ship-To Code			Customer					
State NE					End Cust or Ship-To E			Dealer					
Zip Code 99999													
Country USA					County NEMAHA							127	
General Info Personnel Sales Calls Fleet Profile Purch Priorities Parts-Service													
Change Priority Order Save and Display New Order													
1		Bid Specification		7		Fuel Economy		13		Price			
2		Country of Origin		8		Image		14		Weight			
3		Driver Preference		9		Maintenance		15		Product Reputation			
4		Durability		10		Parts Availability		16		Service Support			
5		Financing		11		Parts Pricing		17		Warranty			
6		Fleet Standardization		12		Performance		18		Other			

Use this screen to record customer's purchasing priorities.

Click on "Change Priority Order" to initiate or change priorities.

When you click beside the priority, the next number will appear.

Entries of minor importance need not be numbered.

CUSTOMER PARTS & SERVICE:

Customer Information			
Dealer Customer Number		0000000123	
Name	A NEW CUSTOMER		
Address	1234 HERO LANE		
Address			
Address			
City	OMAHA		
State	NE	Zip Code	99999
Country	USA		
Country Code		Area Code	Number
Phone			
Fax			
Ship-To Code			Customer
End Cust or Ship-To		E	Dealer
County		NEMAHA	127
OK			
General Info Personnel Sales Calls Fleet Profile Purch Priorities Parts Service			
	Date	Parts Activities	Service Activities
*			

Use this screen to record parts and service information that will be helpful reference when making future sales calls on this customer.

DEALER ITEM TABLE:

Dealer Items

Print ☒ All ☐ Selected Make ☐ Selected Make and Model OK

Sales Code	Make	Model	Allied Sales Code	Description
▶ D00002	MISC			Cascade Attachment 98765
D00001	MISC			Cascade Attachment 12345
D00003	BBLU	FX5	FX5-01	Model FX5 Forklift
D00004	REAL	R1000		Yellow Flashing Strobe Light
*				

Long Description for D00002

Pricing for D00002

	Eff Date	Exp Date	Price	Cost
▶	12/01/97		\$75.00	\$50.00
*				

Navigation: [Left] [Right] [Find] [Only] [All] [Multi] [Sort] [Make, Model, Category]

Search: MISC

Use this function to maintain dealer installed items and Allied Equipment price lists. Use **MAKE** of “**MISC**” for items that are available across product lines. **MAKE** is limited to 4 characters because it is stored in the SERIES field on HERO. For Allied Equipment, Allied Sales Code would be the option code identified from the vendor. This will aid in cross-referencing to Allied price lists.

Each Dealership controls what category assignments are used within the Dealer Item table. Category values are used in the Spec Builder process, so care should be given to choosing the categories to help make the specification process more efficient. Example, Attachments could be loaded as a single category called ATTACHMENTS, or separate categories by brand name or attachment function, etc.

Use PRINT ON QUOTE = “N” (found at the far right of the main area using the scroll bar) to include dollar values in the customer quote but hide item description. Example: Dealer profit margin for Hyster extended warranty.

NEW QUOTE PROCESS:

To start a new quote, from the Quote Summary screen, click on the “+” ICON.

The screenshot shows the 'Create New Quote' dialog box in the Hyster Electronic Retail Organizer. The dialog has a menu bar (File, Function, Quotes, ITA, Reports, Utilities, Help) and a toolbar with 'Xmit', 'OK', and 'Cancel' buttons. The 'Customer' field is a pull-down menu showing 'A NEW CUSTOMER'. Below it is a table with customer data:

Cust #	Name	Address Line 1	City	St
0000000123	A NEW CUSTOMER	1234 HERO LANE	OMAHA	NE

Below the table is the 'Quote Type' section with three radio buttons: 'F - New Factory Model' (selected), 'S - Sold Alone Equipment', and 'A - Allied Equipment'. There is also a checkbox for 'Create as Test Quote'. The main area of the dialog is a large empty space with a dotted pattern. At the bottom, there are filters for 'View by' (Quote, Model), 'Status' (All, Open, Closed), 'Date Range' (All, Eff Date MM/DD/YY to MM/DD/YY), and a search bar with 'Find', 'Only', 'All', 'Multj', 'Sort', and '[Quote No] desc' buttons.

Select customer from Customer table “pull down” .

Choose type of quote: New Factory Model, Sold Alone Equipment, or Allied Equipment.

If you want to create a TEST quote that will not be used for a customer, click on the CREATE AS TEST QUOTE button. Any quote marked TEST will not be counted in HERO Closure and Awareness figures.

NOTE: *Orders cannot be created from TEST quotes.*

[illegible]

To create a model(s) for the quote, use either the add BASE model or TEMPLATE buttons.

For common quote specs for a single model, a specification template can be built and selected as needed, eliminating the need to enter option specs each time. Once a template is selected, the quote specs can be altered from the original template version.

BASE MODEL SELECTION:

Model Selection

Electric **Narrow Aisle** **Pallet Truck** **SpaceSaver** **Challenger**

Series	Model	Description
C098	E100XL2	E100XL2
C098	E100XL2S	E100XL2S
C098	E120XL2	E120XL2
D114	E25XM	E25XM BASIC
Z943	E30FR-24	E30FR-24 VOLT BASIC
Z943	E30FR-36	E30FR-36 VOLT BASIC
D114	E30XM	E30XM BASIC
Z943	E35FR	E35FR BASIC
D114	E35XM	E35XM BASIC
Z943	E40FR	E40FR BASIC
D114	E40XMS	E40XMS BASIC
Z943	E45FR	E45FR BASIC
F108	E45XM	E45XM
Z943	E50FR	E50FR BASIC
F108	E50XM	E50XM
F108	E55XM	E55XM
F108	E60XM	E60XM
F108	E65XM	E65XM

STANDRIVE

SIT DOWN

OK Cancel Help

Select the type of truck by class (1 through 5) then select series/model.

Quote Header

Quote # Transmit ☐ Type ☐ Use Dir Stock

Print Help OK

Customer

Parent Co.

Salesperson FOB Loc

Terms Delivery

Description

Effective Date

Expiration Date

Days to Expiration

1 US\$ = Local Current

Quote Models										Customer Info		Comments		Model Comments		Option Comments		Approval	
Series	Model	Qty	Won	Lost	Dead	Prob%	Condition	Status	Quote Amount	Model Close Date	Price Date								
C098	E100XL2	1	0	0	0	50	New	Quote	\$41,625.00		03/06/98								

Add Model Selected Model Won / Lost Details Financial Worksheets

Base Templates **Truck Options!** Order Delete Model Summary Model Summary

Once the model or template is selected, the model record is added to the quote. Quantity defaults to 1 but can be changed as needed. Next click on TRUCK OPTIONS to spec out the quote.

TRUCK SPECIFICATION BUILDER:

Truck Specification Builder

Series: C098 Model: E100XL2 Quote: F10000 Cust: A NEW CUSTOMER

Help OK

Modify Specification **ERRORS EXIST**

Category	Option / SQ	Description	Price (each)	Qty	Dim	S
BASIC MODEL	05103	E100XL2	\$41,625.00	1		S

Model List: \$41,625.00 Options List: \$0.00 Total: \$41,625.00

SQ Opt List

The model option is added. The ERRORS EXIST button is displayed in red because compatibility errors will exist until the remaining quote specs are entered. Click on MODIFY SPECIFICATIONS to enter remaining option specs.

Truck Specification Builder

Series : C098 Model : E100XL2 Quote : F10000 Cust : A NEW CUSTOMER

Compatibility Enforce ☒ ON **ERRORS EXIST** Fix Explain Available Incompatible **Selected** Quoted Rules

Cat ID	Category Description	Option	Description	STD	Price
051	BASIC MODEL	05103	E100XL2	STD	\$41,625.00
052	ENGINE/VOLTAGE				
032	CONTROL-DIRECTIONAL				
028	CONTROLS				
047	HYDRAULIC LIFT CONTROL				
024	FIELD WEAKENING				
021	BRAKES (PARK BRAKE)				
080	B.D.I.				

Required Single ☒ Factory ☐ Dealer ☐ SPED Price List Replace Delete Quote Reference Full Desc

Category	Option / SQ	Description	Price (each)	Qty	Dim	S
BASIC MODEL	05103	E100XL2	\$41,625.00	1		S

Model List : \$41,625.00 Options List : \$0.00 Total : \$41,625.00 **SQ Opt List**

Screen consists of grids for Option Categories, Option Selections, and Quoted Specs.

Required categories are in **Red**. Optional categories are in **Black**. Once a selection has been made, the category will change to **Blue**.

For each desired category, select and add the option to the quote. Category will indicate if a **single** or **multiple** choice is allowed from the category and if it is **optional** or **required**. Options that must appear on the quote to invoke compatibility rules should be added to the spec using the **Reference** button. This shows the option with a quantity of zero, but includes the compatibility edits relating to other option categories. If an option is to be included in the quote for informational or separate pricing needs, it should be selected with the **Quote** button rather than the **Add** button. Quoted options will appear in the comment text of a printed quote, with pricing handled by the user as an add-on or delete amount that is user specified.

Using the **"FIX"** button will cause all standard options to be selected. A warning message is presented to indicate which option selection will be made. System will ask if messages are desired on each option category. Replying **NO** will stop additional messages from being displayed during the "fix" process.

Clicking the **DEALER** button will allow selections from the Dealer Item Table.

Clicking the **SQ OPT LIST** button will display selections available from the SPED Quote table. Only unexpired quotes assigned to the quoted customer will be available for selection. The SQ/Items will appear in the Option selection section of the screen, based on the option category specified for each item., and can be added to a truck spec from there.

To view an option's long description, click on the **FULL DESC** button.

Clicking the **RULES** button will display the compatibility rules that exist for the model being quoted.

Once the specification has been created, click on the **OK** button to save the specs. Clicking the **CANCEL** button will delete all specifications selected during the current session.

Truck Specification Builder

Series : C098 Model : E100XL2 Quote : F10000 Cust : A NEW CUSTOMER

Compatibility Enforce ☒ ON **ERRORS EXIST** Fix Explain Available Incompatible Selected Quoted Rules

Cat ID	Category Description	Option	Description	STD	Price
051	BASIC MODEL	02801	AE CONTROLS	ILS	(\$2,600.00)
052	ENGINE/VOLTAGE	02802	AP CONTROLS	ILS	\$1,800.00
032	CONTROL-DIRECTIONAL	02803	AS CONTROLS	STD	\$0.00
028	CONTROLS				
047	HYDRAULIC LIFT CONTROL				
024	FIELD WEAKENING				
021	BRAKES (PARK BRAKE)				
080	B.D.I.				

Required Single ☒ Factory

Category	Option
BASIC MODEL	0510
ENGINE/VOLTAGE	0520
CONTROL-DIRECTIONAL	0320

Hyster Electronic Retail Organizer

Adding the following default options for 02803 : AS CONTROLS

- 04701 : HOIST CONTROL-CONTACTOR
- 02402 : FIELD WEAKENING-WITHOUT
- 02101 : PARK BRAKE-MANUAL
- 08001 : BATTERY INDICATOR
- 05601 : UL APPROVAL-E

OK

Price (each)	Qty	Dim	Std
\$41,625.00	1		S
\$0.00	1		S
\$0.00	1		S

Model List : \$41,625.00 Options List : \$0.00 Total : \$41,625.00

30 Opt List

If an option is chosen that requires other options in combination, HERO will display a message stating which options will be added to the truck specification to fulfill that particular option combination requirement.

Truck Specification Builder

Series : C098 Model : E100XL2 Quote : F10000 Cust : A NEW CUSTOMER

Compatibility Enforce ☒ ON

Buttons: Explain Available **Incompatible** Selected Quoted Rules

Cat ID	Category Description	Option	Description	STD	Price
062	TIRES-STEER	15007	111" 2/STG VISTA UPRT 83.5"	IAS	\$5,075.00
066	HYDRAULIC CONTROL	15008	136" 2/STG VISTA UPRT 96"	IAS	\$5,175.00
171	TILT-MAST	15009	158.5" 2/STG VISTA UPRT	IAS	\$5,305.00
150	MASTS	15092	2/S U#MAST	IAS	\$5,660.00
015	ACCUMULATOR	15093	2/S U#MAST	IAS	\$6,005.00
086	LIGHTS	15203	111" F.L. VISTA UPRT 83.5" LWRD	IAS	\$6,620.00
157	CARRIAGE OPTIONS	15292	FFL U#MAST	IAS	\$7,175.00
194	ATTACHMENT CARRIAGE	15293	FFL U#MAST	IAS	\$7,840.00

Optional Single ☒ Factory ☐ Dealer

☐ SPED Price List Add Delete Quote Reference Full Desc

Category	Option / SQ	Description	Price (each)	Qty	Dim
TREAD	05801	STD TREAD	\$0.00	1	
TIRES-DRIVE	06102	22X12X16 SMOOTH DRIVE TRIES	\$0.00	1	
TIRES-STEER	06202	18X7X12.1 SMOOTH STEER TIRES	\$0.00	1	
HYDRAULIC CONTROL	06601	2-WAY VALVE	\$0.00	1	
TILT-MAST	17101	5 FWD X 8 BACK TILT	\$0.00	1	
WARRANTY	60002	WARRANTY: 12 MO, 2000 HRS	\$0.00	1	
BATTERY CONNECTOR	14501	POSITION B BATTERY CONNECTOR	\$0.00	1	
MARKETING SERVICES	00401	MARKETING SERVICES FEE	\$25.00	1	

Model List : \$41,625.00 Options List : \$0.00 Total : \$41,625.00

Buttons: SQ Opt List

Options that are not available are shown in gray. If an option is not available, the **INCOMPATIBLE** button will be highlighted in black and clicking the **EXPLAIN** button will show the edit rule that applies.

Hyster Electronic Retail Organizer

15008 : 136" 2/STG VISTA UPRT 96" LWRD 6.5" F.L. is excluded by :

17101 : 5 FWD X 8 BACK TILT

OK

Turning the **Compatibility Enforce** switch off will bypass all compatibility editing. This should only be done with the approval of Hyster Marketing.

Truck Specification Builder

Series : C098 Model : E100XL2 Quote : F10000 Cust : A NEW CUSTOMER

Compatibility Enforce ☒ ON

Available Incompatible **Selected** Quoted Rules

Cat ID	Category Description	Option	Description	STD	Price
062	TIRES-STEER	15007	111" 2/STG VISTA UPRT 83.5"	IAS	\$5,075.00
066	HYDRAULIC CONTROL	15008	136" 2/STG VISTA UPRT 96"	IAS	\$5,175.00
171	TILT-MAST	15009	159.5" 2/STG VISTA UPRT	IAS	\$5,305.00
150	MASTS	15092	2/S U#MAST	IAS	\$5,660.00
015	ACCUMULATOR	15093	2/S U#MAST	IAS	\$6,005.00
086	LIGHTS	15203	111" F.L. VISTA UPRT 83.5" LWRD	IAS	\$6,620.00
157	CARRIAGE OPTIONS	15292	F.L. U#MAST	IAS	\$7,175.00
194	ATTACHMENT CARRIAGE	15293	F.L. U#MAST	IAS	\$7,840.00

Optional Single ☒ Factory ☐ Dealer

☐ SPED Price List Replace Delete Quote Reference Full Desc

Category	Option / SQ	Description	Price (each)	Qty	Dim
TREAD	05801	STD TREAD	\$0.00	1	
TIRES-DRIVE	06102	22X12X16 SMOOTH DRIVE TRIES	\$0.00	1	
TIRES-STEER	06202	18X7X12.1 SMOOTH STEER TIRES	\$0.00	1	
HYDRAULIC CONTROL	06601	2-WAY VALVE	\$0.00	1	
TILT-MAST	17101	5 FWD X 8 BACK TILT	\$0.00	1	
MASTS	15092	2/S U#MAST	\$5,660.00	1	REQ
WARRANTY	60002	WARRANTY: 12 MO, 2000 HRS	\$0.00	1	
BATTERY CONNECTOR	14501	POSITION B BATTERY CONNECTOR	\$0.00	1	
MARKETING SERVICES	00401	MARKETING SERVICES FFF	\$25.00	1	

Model List : \$41,625.00 Options List : \$0.00 Total : \$41,625.00

SQ Opt List

Example of a completed spec.

If a dimension is required for an option, REQ will be displayed in the "Dim" field. Click on the field to receive a complete list of valid dimension values to select from, as shown in the example on the next page.

Select Dimension

15092 : 2/S U#MAST

Allowed Dimension (metric)	Allowed Dimension (inches)	Lowered Height (inches)	Free Lift Height (inches)	Fork Thickness (inches)
2190	88.5	72.5	6.5	2.5
2240	90.5	73.5	6.5	2.5
2290	92.5	74.5	6.5	2.5
2340	94.5	75.5	6.5	2.5
2390	96.5	76.5	6.5	2.5
2440	98.5	77	6.5	2.5
2490	100.5	78	6.5	2.5
2540	102.5	79	6.5	2.5
2590	104.5	80	6.5	2.5
2640	106.5	81	6.5	2.5
2690	108.5	82	6.5	2.5
2790	112	84	6.5	2.5
2840	114	85	6.5	2.5
2890	116	86	6.5	2.5
2940	118	87	6.5	2.5
2990	120	88	6.5	2.5
3040	122	89	6.5	2.5
3090	124	90	6.5	2.5

OK

Select the desired option dimension from the pull down list.

Truck Specification Builder

Series : C098 Model : E100XL2 Quote : F10000 Cust : A NEW CUSTOMER

Compatibility Enforce ☒ ON

Available Incompatible **Selected** Quoted Rules

Cat ID	Category Description	Option	Description	STD	Price
062	TIRES-STEER	15007	111" 2/STG VISTA UPRT 83.5"	IAS	\$5,075.00
066	HYDRAULIC CONTROL	15008	136" 2/STG VISTA UPRT 96"	IAS	\$5,175.00
171	TILT-MAST	15009	159.5" 2/STG VISTA UPRT	IAS	\$5,305.00
150	MASTS	15092	2/S U#MAST	IAS	\$5,660.00
015	ACCUMULATOR	15093	2/S U#MAST	IAS	\$6,005.00
086	LIGHTS	15203	111" F.L. VISTA UPRT 83.5" LWRD	IAS	\$6,620.00
157	CARRIAGE OPTIONS	15292	FFL U#MAST	IAS	\$7,175.00
194	ATTACHMENT CARRIAGE	15293	FFL U#MAST	IAS	\$7,840.00

Optional Single ☒ Factory ☐ Dealer

☐ SPED Price List

Replace Delete Quote Reference Full Desc

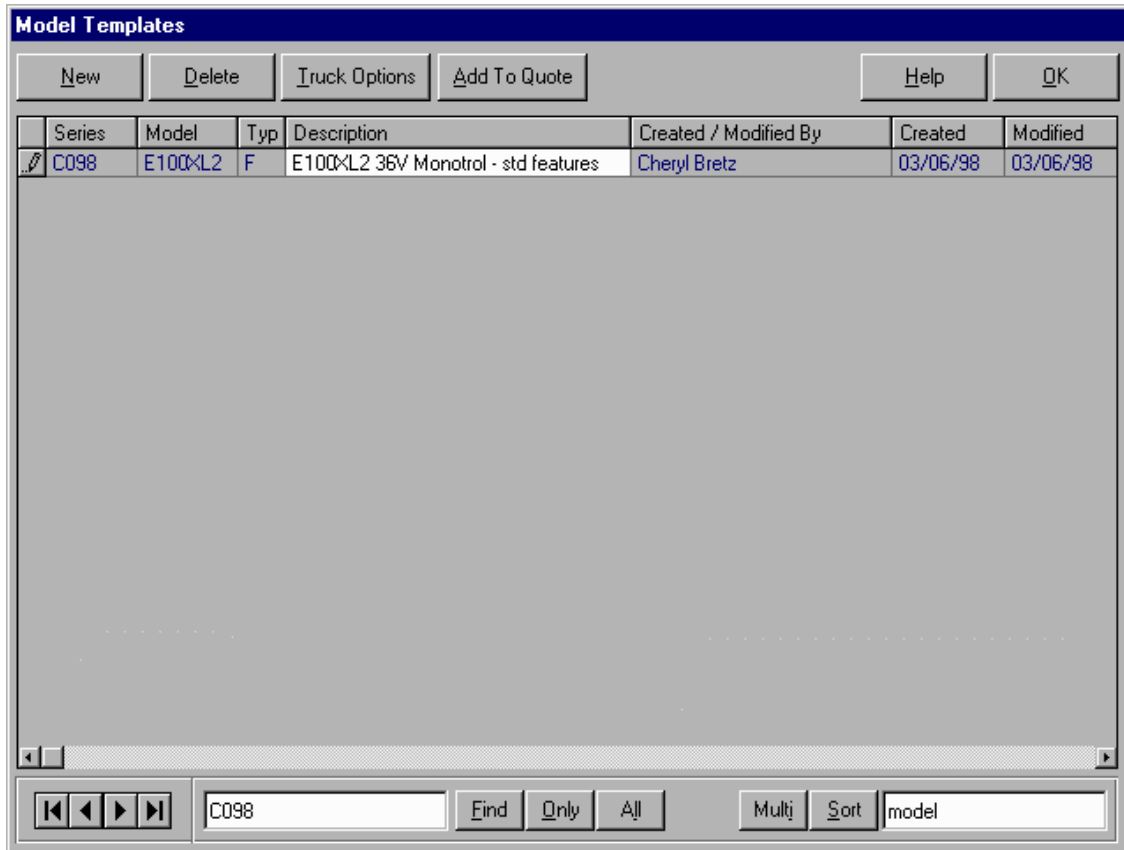
Option / SQ	Description	Price (each)	Qty	Dim	STD	Disc
06503	NON-SUSPENSION VINYL SEAT	\$0.00	1		STD	Y
10101	WITHOUT FLOORMAT	\$0.00	1		STD	Y
05801	STD TREAD	\$0.00	1		STD	Y
06102	22X12X16 SMOOTH DRIVE TRIES	\$0.00	1		STD	Y
06202	18X7X12.1 SMOOTH STEER TIRES	\$0.00	1		STD	Y
06601	2-WAY VALVE	\$0.00	1		STD	Y
17101	5 FWD X 8 BACK TILT	\$0.00	1		STD	Y
15092	2/S U#MAST	\$5,660.00	1	2190	IAS	Y
60002	WARRANTY: 12 MO. 20000 HRS	\$0.00	1		STD	

Model List : \$41,625.00 Options List : \$0.00 Total : \$41,625.00

SQ Opt List

The DISC column will show which options are subject to discount.

MODEL TEMPLATE:



The screenshot shows a window titled "Model Templates". At the top, there are buttons for "New", "Delete", "Truck Options", "Add To Quote", "Help", and "OK". Below these is a table with the following data:

	Series	Model	Typ	Description	Created / Modified By	Created	Modified
	C098	E100XL2	F	E100XL2 36V Monotrol - std features	Cheryl Bretz	03/06/98	03/06/98

Below the table is a large empty text area. At the bottom of the window, there is a search bar containing "C098" and buttons for "Find", "Only", "All", "Multi", "Sort", and a text field containing "model".

The Model Template function allows for creation of a truck specification that may be used many times by a particular customer. The template is created in the same manner as a truck specification would be on a quote.

Click on **NEW** to establish a specification template. After creating the template, be sure to supply a description to identify the specification for that template.

Click on **ADD TO QUOTE** to load the template spec to the quote.

Note: The Model Template function may also be accessed by clicking on the  icon from the main screen.

FINANCIAL WORKSHEET:

Hyster Financial Worksheet				
Quote : F10000 Series : C098 Model : E100XL2 Qty : 1			Lease Calc	Summary
Customer : A NEW CUSTOMER			Profit	Print
			OK	
SC Request #			Dealer Cost	Customer Price
Breakout	Factory Options		\$47,490.00	\$47,490.00
	Factory SPED Items List		\$0.00	\$0.00
	Factory List Disc to Cust	0.00	\$0.00	\$0.00
	Factory List Profit to Dlr	44.00	\$20,885.00	
	Factory List Profit to Deliv Dlr	0.00	\$0.00	
	Total Factory to Dlr Discount	44.00	\$20,885.00	
	FACTORY NET		\$26,605.00	\$47,490.00
Breakout	D. Supplied Equip	0.00	\$0.00	\$0.00
	Dealer Prep Charges		\$0.00	\$0.00
	UNIT NET		\$26,605.00	\$47,490.00
	Freight FOB Factory		\$0.00	\$0.00
	Local Delivery		\$0.00	\$0.00
	Other Items		\$0.00	\$0.00
	Adjustment		\$0.00	\$0.00
	TOTAL PRICE		\$26,605.00	\$47,490.00
	Sales Tax Percent	0.000		\$0.00
Details	Trade-In Allowance	☐ (Subject To Sales Tax)		\$0.00

The Financial Worksheet screen allows input of discount levels, sales tax rates, dealer prep charges, freight, etc.

To see totals of discountable versus non discountable factory options and SPED Quotes, click on the first **BREAKOUT** button.

To see Dealer Installed Item information concerning dealer cost versus customer price, click on the second **BREAKOUT** button.

Enter Trade-in data by clicking on the **DETAILS** button. Depending on the state involved, the trade-in amount may be subject to sales tax. Check the appropriate box if sales tax applies.

A printed version of the Financial Worksheet can be created using the **PRINT** button. The print document displays on the screen to preview the text and can then be directed to a printer if desired.

Use the Adjustment line to enter an adjusting value necessary to achieve a desired fixed price of the Customer quote.

Hyster Financial Worksheet					
Quote : F10000 Series : C098 Model : E100XL2 Qty : 1				Lease Calc	Summary
Customer : A NEW CUSTOMER				Profit	Print
				OK	

SC Request	Dealer	Customer	Extended Dealer Cost	Extended Cust Price
Breakout	Factory Options Breakout		\$47,490.00	\$47,490.00
Factory SPED Items			\$0.00	\$0.00
Factory List Disc to C			\$0.00	\$0.00
Factory List Profit to				
Factory List Profit to Deliv				
Total Factory to Dlr Discor			\$0.00	
FACTORY NET			\$26,605.00	\$47,490.00
Breakout	SPED Options Breakout		\$0.00	\$0.00
Dlr Supplied Eq			\$0.00	\$0.00
Dealer Prep Charge			\$0.00	\$0.00
UNIT NET			\$26,605.00	\$47,490.00
Freight FOB Fact			\$0.00	\$0.00
Local Deliv			\$0.00	\$0.00
Other It			\$0.00	\$0.00
Adjustment		\$0.00	\$0.00	\$0.00
TOTAL PRICE		\$26,605.00	\$47,490.00	\$26,605.00
Sales Tax Percent	0.000			\$0.00
Details	Trade-In Allowance	☐ (Subject To Sales Tax)		\$0.00

Breakout of Factory/SPED discountable and non discountable totals.

Hyster Financial Worksheet

Quote : F10000 Series : C098 Model : E100XL2 Qty : 1
Customer : A NEW CUSTOMER

Lease Calc Summary OK
Profit Print

SC Request #

Breakout Factory Options

	Dealer Cost	Customer Price	Extended Dealer Cost	Extended Cust Price
Factory SPED Items List	\$47,490.00	\$47,490.00	\$47,490.00	\$47,490.00
Factory List Disc to Cust			\$0.00	\$0.00
Factory List Profit to Dlr				\$0.00
Factory List Profit to Deliv Dlr				
Total Factory to Dlr Discount				
FACTORY NET				
Breakout Dlr Supplied Equip				
Dealer Prep Charges				
UNIT NET				
Freight FOB Factory				
Local Delivery				
Other Items	\$0.00	\$0.00	\$0.00	\$0.00
Adjustment	\$0.00	\$0.00	\$0.00	\$0.00
TOTAL PRICE	\$26,605.00	\$47,490.00	\$26,605.00	\$47,490.00
Sales Tax Percent	0.000			\$0.00
Details Trade-In Allowance	☐ (Subject To Sales Tax)			\$0.00

Dealer Supplied Equipment Breakout

	Dealer Cost	Customer Price
Dealer Supplied Items List	\$0.00	\$0.00
Miscellaneous Items	\$0.00	\$0.00
Total Dealer Items	\$0.00	\$0.00
Customer Discount	0.00	\$0.00
Total Customer Price		\$0.00

OK

Breakout of dealer cost versus customer price.

Dealer Supplied Items List line will include *both*:

- ⌚ Regular Dealer Item Table items

And

- ⌚ Items entered in Quote Model Comment, with price, either tagged (A) to print Above the Quote total line or (B) to print Below as Comment. (This is how you would include price of dealer items not yet loaded to Dealer Item table or SPED Quote items priced but not downloaded into the price of the Customer Quote.)

Miscellaneous Items line can be used for any adjustments that need to be made to the dealer items totals. Do not enter the price of items already entered in Quote Model Comments items.

Total Dealer Items line is the sum of the Dealer Supplied Items and Miscellaneous Items lines

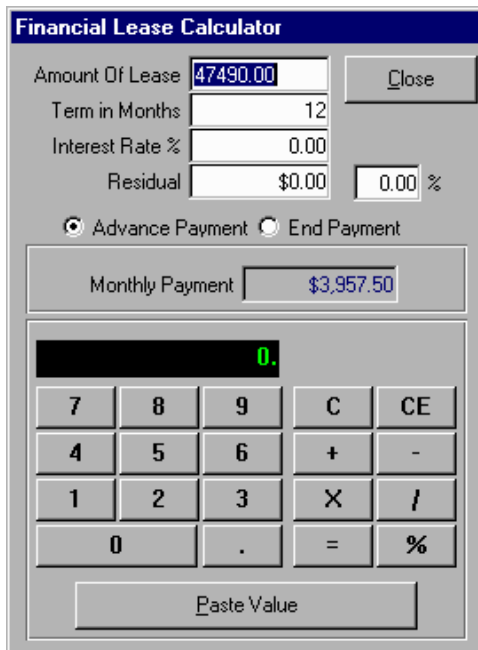
Customer Discount - Dealer Items can be discounted if needed by entering the customer discount in the breakout screen.

TRADE-IN INFORMATION:

Hyster Financial Worksheet						
Quote : F10000 Series : C098 Model : E100XL2 Qty : 1				Lease Calc	Summary	OK
Customer : A NEW CUSTOMER				Profit	Print	
	Make	Model	Serial Number	Value	OK	
*						

This trade-in information will print on the quote document if specified. The total of all trade-in values will carry over to the Financial Worksheet.

LEASE CALCULATOR:



The image shows a software window titled "Financial Lease Calculator". It contains several input fields and a calculator interface. The "Amount Of Lease" field is set to 47490.00. The "Term in Months" field is set to 12. The "Interest Rate %" field is set to 0.00. The "Residual" field is set to \$0.00, with a separate percentage field set to 0.00 %. Below these fields are two radio buttons: "Advance Payment" (selected) and "End Payment". A "Monthly Payment" field shows \$3,957.50. At the bottom is a calculator with a display showing "0." and buttons for digits 0-9, decimal, equals, and percentage. A "Paste Value" button is also present.

Financial Lease Calculator																								
Amount Of Lease	47490.00	Close																						
Term in Months	12																							
Interest Rate %	0.00																							
Residual	\$0.00	0.00	%																					
☒ Advance Payment ☐ End Payment																								
Monthly Payment	\$3,957.50																							
0. <table border="1"><tr><td>7</td><td>8</td><td>9</td><td>C</td><td>CE</td></tr><tr><td>4</td><td>5</td><td>6</td><td>+</td><td>-</td></tr><tr><td>1</td><td>2</td><td>3</td><td>X</td><td>/</td></tr><tr><td>0</td><td>.</td><td>=</td><td>%</td><td></td></tr></table> Paste Value					7	8	9	C	CE	4	5	6	+	-	1	2	3	X	/	0	.	=	%	
7	8	9	C	CE																				
4	5	6	+	-																				
1	2	3	X	/																				
0	.	=	%																					

Use the lease calculator to figure lease payments. The amount of lease is defaulted from the Net Selling price but may be changed. The residual value may be input as an amount, or as a percent of Lease Amount, which will then calculate the residual amount.

If multiple lease periods are to be quoted, the information should be entered into the Quote Model Comments area.

FINANCIAL WORKSHEET SUMMARY:

Hyster Financial Summary Worksheet																		
Quote : F10000 Salesperson : Not Assigned Customer : A NEW CUSTOMER						OK												
Summarize by Model			Booking Dealer Profit Summary															
All All Models			<table> <tr> <td>Dealer Profit From Factory List</td> <td>\$20,885.00</td> </tr> <tr> <td>Dealer Supplied Items Profit</td> <td>\$0.00</td> </tr> <tr> <td>Less Delivery Dealer Profit</td> <td>\$0.00</td> </tr> <tr> <td>Less Delivery Dealer Items</td> <td>\$0.00</td> </tr> <tr> <td>Estimated Dealer Gross Profit</td> <td>\$20,885.00</td> </tr> <tr> <td>Gross Profit Percent</td> <td>78.50</td> </tr> </table>				Dealer Profit From Factory List	\$20,885.00	Dealer Supplied Items Profit	\$0.00	Less Delivery Dealer Profit	\$0.00	Less Delivery Dealer Items	\$0.00	Estimated Dealer Gross Profit	\$20,885.00	Gross Profit Percent	78.50
Dealer Profit From Factory List	\$20,885.00																	
Dealer Supplied Items Profit	\$0.00																	
Less Delivery Dealer Profit	\$0.00																	
Less Delivery Dealer Items	\$0.00																	
Estimated Dealer Gross Profit	\$20,885.00																	
Gross Profit Percent	78.50																	
Model	Qty	List	Dealer Cost	End Customer	Profit \$	Profit %												
E100XL2	1	\$47,490.00	\$26,605.00	\$47,490.00	\$20,885.00	78.50												

The Financial Worksheet Summary allows the dealer profit to be viewed by individual model within a quote or for all models combined on the quote.

PROFIT SUMMARY:

Hyster Financial Worksheet

Quote : F10000 Series : C098 Model : E100XL2 Qty : 1
Customer : A NEW CUSTOMER

Lease Calc Summary OK
Profit Print

SC Request #

Breakout Factory Options Dealer Cost \$47,490.00 Customer Price \$47,490.00 Extended Dealer Cost \$47,490.00 Extended Cust Price \$47,490.00

Factory SPED Items List

Factory List Disc to Cust 0.00

Factory List Profit to Dlr 44.00

Factory List Profit to Deliv Dlr 0.00

Total Factory to Dlr Discount 44.00

FACTORY NET

Breakout Dlr Supplied Equip 0.00

Dealer Prep Charges

UNIT NET

Freight FOB Factory

Local Delivery

Other Items

Adjustment \$0.00

TOTAL PRICE \$26,605.00 \$47,490.00 \$26,605.00 \$47,490.00

Sales Tax Percent 0.000 \$0.00

Details Trade-In Allowance ☐ (Subject To Sales Tax) \$0.00

Booking Dealer Profits

	Unit	Extended
Dealer Profit From Factory List	\$20,885.00	\$20,885.00
Dealer Supplied Profit	\$0.00	\$0.00
Less Delivery Dealer Profit	\$0.00	\$0.00
Less Delivery Dealer Items	\$0.00	\$0.00
Miscellaneous Profit	\$0.00	\$0.00
Estimated Dealer Gross Profit	\$20,885.00	\$20,885.00
Gross Profit Percent	78.50	

OK

The profit summary shows per unit totals and extended values for each model. The value of items supplied by the delivering dealer if out of territory can be input to this screen.

FINANCIAL WORKSHEET PRINT:

HYSTER FINANCIAL WORKSHEET

Quote Number : F10000
 Customer : A NEW CUSTOMER
 Quantity : 1
 Series : C098
 Model : E100XL2

Hyster Special Commitment Number :

			DEALER COST	CUSTOMER PRICE	EXT DEALER COST	EXT CUST PRICE
Factory Options			\$47,490.00	\$47,490.00	\$47,490.00	\$47,490.00
Factory SPED Items List			\$0.00	\$0.00	\$0.00	\$0.00
Factory List Discount To Customer	0.00%	\$0.00		\$0.00		\$0.00
Factory List Profit To Booking Dealer	44.00%	\$0,885.00				
Factory List Profit To Delivery Dealer	0.00%	\$0.00				
TOTAL FACT TO DLR DISCOUNT	44.00%	\$0,885.00	(\$20,885.00)		(\$20,885.00)	
FACTORY NET			\$26,605.00	\$47,490.00	\$26,605.00	\$47,490.00
Dealer Supplied Equipment	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Dealer Preparation Charges			\$0.00	\$0.00	\$0.00	\$0.00
UNIT NET			\$26,605.00	\$47,490.00	\$26,605.00	\$47,490.00
Freight FOB Factory			\$0.00	\$0.00	\$0.00	\$0.00
Local Delivery			\$0.00	\$0.00	\$0.00	\$0.00
Other Items			\$0.00	\$0.00	\$0.00	\$0.00
Adjustment			\$0.00	\$0.00	\$0.00	\$0.00
TOTAL PRICE			\$26,605.00	\$47,490.00	\$26,605.00	\$47,490.00

Use the tool bar at the top of the screen to:

- ① create a printed document
- ① export the document to a file for later input to a text editor process like Microsoft WORD
- ① alternate viewing the document in one of 3 screen sizes

CUSTOMER DATA:

Quote Header

Quote # Transmit ☐ Type ☐ Use Dir Stock

Customer Effective Date
 Parent Co. Expiration Date
 Salesperson FOB Loc Days to Expiration
 Terms Delivery 1 US\$ = Local
 Description

Customer Info | Quote Models | Comments | Model Comments | Option Comments | Approval

Customer: Ship To:
 1234 HERO LANE
 OMAHA, NE 99999
 USA
 New Cust
 SIC

Select	Contact Name	Title	Phone	Fax	Company	Adr To	CC	Dec Mkr
*						☐	☐	☐

Use the Customer tab to select a Ship-to Name and Address if different from the customer ordering location. Key contact information is available as a selection based on personnel data from both the Customer and Ship To customer records.

To select contact information, click once in the Select box, and then click on the pull-down button. Customer contacts will print on the quote above Customer name. Ship-to contacts will print above the Ship-to name.

Additional contact information not available from the Customer Table may also be entered here, and it will print on the quote above Customer name. These will only appear on the printed quote, and will not be added to the Customer's contact data.

QUOTE COMMENT DATA:

The image shows a software window titled "Quote Header". At the top, there are input fields for "Quote #" (F10000), "Transmit" (checkbox), "Type" (F), and "Use Dir Stock" (checkbox). To the right are "Print", "Help", and "OK" buttons. Below this is a section for customer and sales information: "Customer" (A NEW CUSTOMER), "Parent Co." (empty), "Salesperson" (Not Assigned), "FOB Loc" (Will Advise), "Terms" (dropdown), "Delivery" (FOB), and "Description" (empty). To the right of this section are "Effective Date" (03/06/98), "Expiration Date" (04/05/98), "Days to Expiration" (30), and a currency conversion section showing "1 US\$ = 1.0000" with "Local" and "Current" buttons. At the bottom, there is a tabbed interface with tabs for "Quote Models", "Customer Info", "Comments" (which is selected), "Model Comments", "Option Comments", and "Approval". Below the "Comments" tab is a large, empty text area labeled "Quote Comments" with a vertical scrollbar on the right.

Comment data is loaded to the quote using this screen. This information is **not** printed on the quote document. It is intended for internal dealer use.

QUOTE MODEL COMMENT DATA:

Quote Header

Quote # Transmit ☐ Type ☐ Use Dir Stock

Print Help OK

Customer

Parent Co.

Salesperson FOB Loc

Terms Delivery

Description

Effective Date

Expiration Date

Days to Expiration

1 US\$ = Local

Quote Models Customer Info Comments **Model Comments** Option Comments Approval

Model

	Additional Dealer Supplied Items and Comments	Price	Cost	Print Pos	Print Seq
*					

Comments for printing on the Customer quote are tied to a Model. If more than one model exists on the quote, pick the model using the arrows next to the model, then enter the desired comment text.

Each comment can have multiple lines of text. The pull down will allow pasting of comments from the Standard Comments table maintained under the Utility menu. Once a comment is selected from the Standard Comments table, it can be edited as needed.

Enter an "A" in the print position if the text is to print below the quote spec but above the quote totals, and a "B" if the text is to print below the quote totals. The sequence number allows resorting text lines as needed, by utilizing the SORT button.

Comments with a Print Position of "A" will automatically add the price and cost fields to the Financial Worksheet. These will be shown in the Dealer Supplied Items List totals of the breakout screen for Dealer Supplied Equipment.

QUOTE OPTION COMMENTS DATA:

Quote Header

Quote # Transmit ☐ Type ☐ Use Dir Stock

Customer Parent Co.

Salesperson FOB Loc Terms

Delivery Effective Date Expiration Date Days to Expiration

1 US\$ = Local

Quote Models | Customer Info | Comments | Model Comments | **Option Comments** | Approval

Model

Category	Option	Description	Price	Print
BASIC MODEL	05103	E100XL2	\$41,625.00	L
ENGINE/VOLTAGE	05201	36 VOLT		
CONTROL-DIRECTIONAL	03201	DIRECTIONAL CONTROL-MONOTRO		
CONTROLS	02803	AS CONTROLS		
HYDRAULIC LIFT	04701	HOIST CONTROL-CONTACTOR	\$0.00	L
FIELD WEAKENING	02401	FIELD WEAKENING	\$180.00	L

Option Comment

Select from Standard Comments

Print Column Dropdown: H Hide Option, L Long Description, S Short Description

This tab allows for the addition of detailed option description that will print below each option on the quote print. **Note:** Any selection from the **Select from Standard Comments** will override existing information in the **Option Comment** area.

The **Print** column offers pull-down selections to hide the option (H), to print the long description (L), or print the short option description (S). Clicking the **SAME** button will change the **Print** column for all options to what is selected for the first option.

Long description (L) is the default print selection. You may change individual options, or change all other options to (S) or (H) using the SAME button.

CHANGE EXISTING QUOTE:

To change an existing open quote, select the quote from the Quote summary screen and either double click on it or click on the REVIEW/EDIT icon.

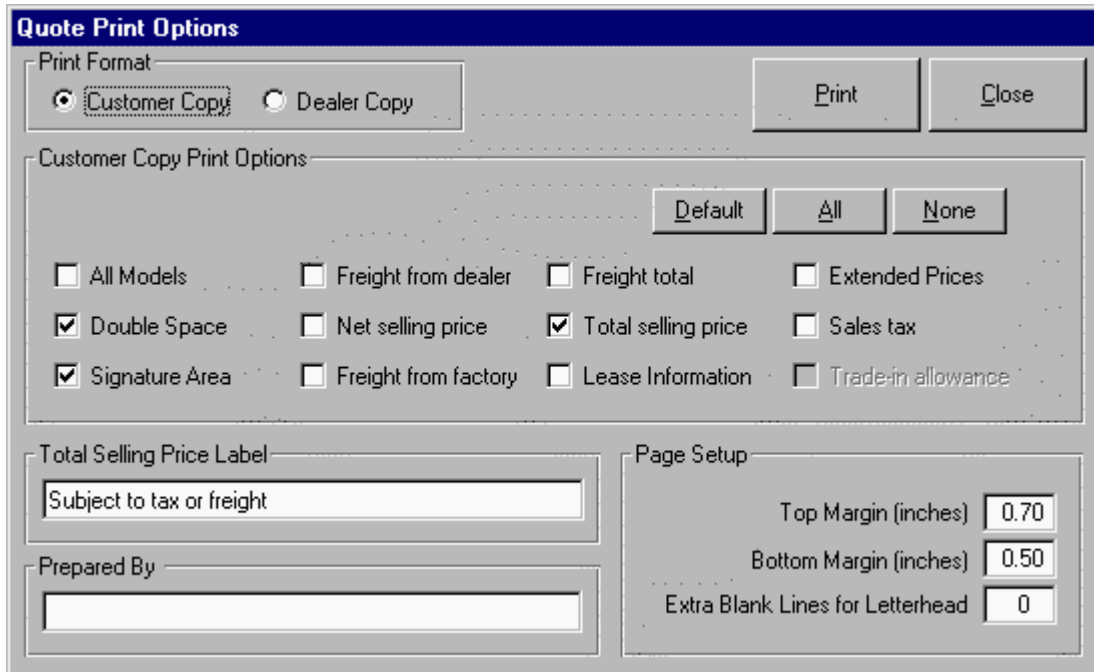
Xmit	Quote #	Customer	Cust City	St	Parent Co.	Eff Date	Exp Date
	F10002	A NEW CUSTOMER	OMAHA	NE		03/06/98	04/05/98
	F10001	A NEW CUSTOMER	OMAHA	NE		03/06/98	04/05/98
	F10000	A NEW CUSTOMER	OMAHA	NE		03/06/98	04/05/98

Each model within a quote stays in open status until it is ordered or updated as lost or dead. As long as the model is open, any quote data can be modified. When all models are closed, then the quote is closed as well.

QUOTE PRINT FUNCTION:

To print a quote document, click on PRINT button of Quote Header screen. The default Quote Print settings will be selected. Change any settings for the specific quote being printed, then click on the PRINT button to preview the quote document. The print detail options follow the format of the Financial Worksheet screen.

The margin settings can be altered to achieve desired page overflow of the quote document.



The image shows a 'Quote Print Options' dialog box. At the top, there's a title bar 'Quote Print Options'. Below it, the 'Print Format' section has two radio buttons: 'Customer Copy' (selected) and 'Dealer Copy'. To the right are 'Print' and 'Close' buttons. The 'Customer Copy Print Options' section contains a grid of checkboxes: 'All Models' (unchecked), 'Double Space' (checked), 'Signature Area' (checked), 'Freight from dealer' (unchecked), 'Net selling price' (unchecked), 'Freight from factory' (unchecked), 'Freight total' (unchecked), 'Total selling price' (checked), 'Lease Information' (unchecked), 'Extended Prices' (unchecked), 'Sales tax' (unchecked), and 'Trade-in allowance' (unchecked). Above this grid are 'Default', 'All', and 'None' buttons. Below the grid, there's a 'Total Selling Price Label' section with a text box containing 'Subject to tax or freight', and a 'Prepared By' section with an empty text box. On the right, the 'Page Setup' section has three input fields: 'Top Margin (inches)' with '0.70', 'Bottom Margin (inches)' with '0.50', and 'Extra Blank Lines for Letterhead' with '0'.

Note: Older quotes that were imported into HERO will not have any print options selected. Press the Default button to apply the default print options.

Sample quote document:

INVESTMENT PROPOSAL

Quote No : F10002 *Model :* E35XM *Terms :*
Date : 03/06/98 *Quantity :* 1 *F.O.B. :* Will Advise
Expires : 04/05/98 *Type :* New *Delivery :* FOB

Quote To :

Customer : A NEW CUSTOMER *Skip To :* A NEW CUSTOMER
 1234 HERO LANE 1234 HERO LANE
 OMAHA, NE 99999 OMAHA, NE 99999
 USA USA

<i>Option / SPED SQ</i>	<i>Qty</i>	<i>Item Description</i>	<i>Price</i>
05103	1	BASIC MODEL: HYSTER E35XM	\$23,375.00
05201	1	VOLTAGE: 36 Volt	\$0.00
02802	1	CONTROLS: ENHANCED PACKAGE	\$0.00
02101	1	PARK BRAKE: Manual	\$0.00
08001	1	BDE: With Lift Interrupt	\$0.00
03201	1	DIRECTIONAL CONTROL: MONOTROL Pedal	\$0.00
04701	1	HYDRAULIC CONTROL: Contactor Hydraulics	\$0.00
05601	1	UL CLASS APPROVAL: E	\$0.00
02701	1	BATTERY COMPARTMENT SIZE: 34.6"	\$0.00
13601	1	HOOD: Standard	\$0.00
03101	1	BATTERY COMPARTMENT ROLLERS: None	\$0.00
02001	1	CONSTRUCTION: Standard	\$0.00
07101	1	OVERHEAD GUARD: 87.5" Grid Style	\$0.00
06502	1	SEAT: Cloth Semi-Suspension w/restraint	\$500.00
05801	1	TREAD: Standard	\$0.00
11002	1	BATTERY SIDE COVERS: None	-\$85.00
06102	1	18X6X12.1 SMOOTH DRIVE TIRES	\$0.00
06201	1	14X4.5X8 SMOOTH STEER TIRES	\$0.00

The quote print document will first be displayed in preview mode. Use the tool bar at the top of the screen to create a printed document, export the document to a file, or for viewing the document at one of 3 screen sizes.

If the quote document needs to be modified from the HERO version created, export the document to a file, then import that file into a word processor package like MS-WORD for further updating. Use this method for text and font changes, alternate pricing, etc.

WON / LOST DETAIL:

Quote Header

Quote # Transmit ☐ Type ☐ Use Dir Stock

Customer Effective Date
Parent Co. Expiration Date
Salesperson FOB Loc
Terms Delivery Days to Expiration
Description 1 US\$ = Local

Quote Models | Customer Info | Comments | Model Comments | Option Comments | Approval

	Series	Model	Qty	Won	Lost	Dead	Prob%	Condition	Status	Quote Amount	Model Close Date	Price Date
▶	C098	E100XL2	1	0	0	0	50	New	Quote	\$41,625.00		03/06/98

Add Model | Selected Model | **Won / Lost Details** | Financial Worksheets

Base | Templates | | Order | Delete | Model | Summary | Model | Summary

To update the “Lost or Dead” information for Closure and Awareness click on the MODEL button of WON/LOST DETAILS.

Use the WON/LOST DETAILS SUMMARY button to view status of quote activity.

QUOTE DETAILS BY MODEL:

Quote Details							
Model	E35XM	Quote Qty	1	Status	Quote	Probability of Close	1 %
Close Date		Open	1	Condition	New	Price Date	03/06/98
Quote Amount	\$23,815.00	Won	0	Term	12	Interest Rate	0.00 %
		Lost	0	Residual			\$0.00
		Dead	0				

Won						
Qty	Request #	Hyster Order #	Received Date	Request Date	Xmit	Pend Chg

Lost					
Qty	Date	Competitor	Model	Price	Type

Dead		
Qty	Date	Comments
*		

Use this screen to update quote quantity or status information.

If a quote is lost, click on NEW LOST button and enter information pertaining to the Competitor who made the sale.

If the customer decides not to purchase any product, this information is maintained in the DEAD section of the screen.

Once the total of the won, lost, and dead equals the quoted quantity of the model, then the quoted model will be closed. Increasing the quoted quantity once a model is closed will cause the model to be re-opened for additional processing.

LOST SALE DETAILS:

Quote Details		
Lost Sale Details		
Date	06/06/98	Winning Brand
		Winning Type
		Help OK
☐	Reason	Comment
☐	Unknown	
☐	Price	
☐	Brand Preference	
☐	Spec Preference	
☐	Delivery	
☐	Service / Parts	
☐	Trade-In Value	
☐	Warranty	
☐	Terms / Conditions	
Winning Details		
Model	Qty 1	Price \$0.00 0.0%
		Is Hyster a consideration in the future? Y
Additional Comments		Action Recommended

Use this screen to enter winning brand and type, reasons for lost sale if known, winning details if known, and additional comments or action for future follow up. This information will be used in reporting Closure and Awareness analysis.

TRANSFERRING QUOTES BETWEEN HERO SYSTEMS:

Quote Header

Quote # Transmit ☐ Type ☐ Use Dlr Stock

Print Help OK

Customer

Parent Co.

Salesperson FOB Loc

Terms Delivery

Description

Effective Date

Expiration Date

Days to Expiration

1 US\$ = Local Current

Quote Models Customer Info Comments Model Comments Option Comments **Approval**

Transmission Approval

Password Approve Timestamp

Manager Approval

☐ Approved

Once a Customer Quote has been prepared, the quote can be transferred between Dealer Host, Branch and Sales Rep PC's by using the APPROVE function to queue the quote for transfer.

Note:

1. If changes are required to the Quote, before transmitting, you can unlock the Quote and make necessary changes then APPROVE again to queue the Quote for transfer.
2. If changes are required to Truck Options, Shipping information, etc. after the Quote has been transferred you should make necessary modifications then APPROVE again and uploaded the modified Quote.

QUOTE COPY FUNCTION:

To copy a quote to another quote, highlight the quote to be copied.

From the QUOTE menu , select the COPY function.

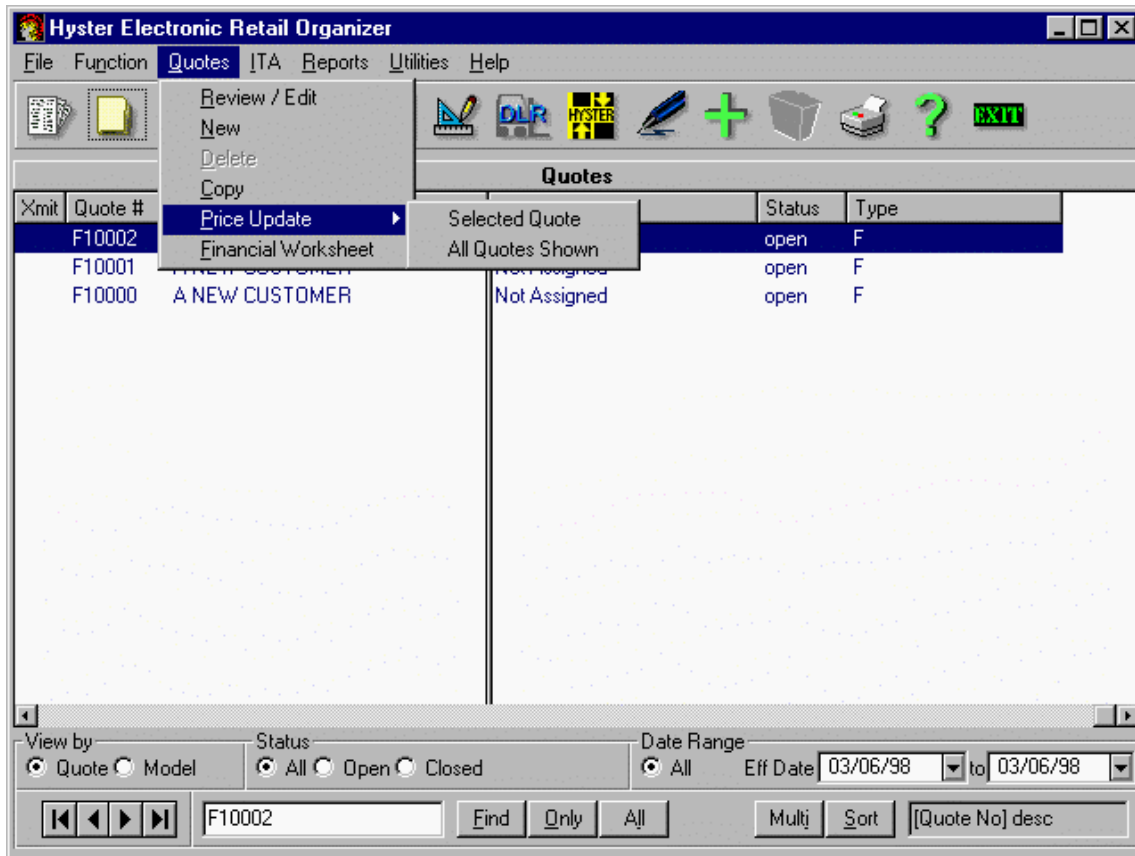
Xmit	Quote #	Customer	Cust City	St	Parent Co.	Eff Date	Exp Date
	F10002	A NEW CUSTOMER	OMAHA	NE		03/06/98	04/05/98
	F10001	A NEW CUSTOMER	OMAHA	NE		03/06/98	04/05/98
	F10000	A NEW CUSTOMER	OMAHA	NE		03/06/98	04/05/98

If the quote contains multiple models, specify if all or only selected models are to be copied.

Once the new quote is created, normal editing rules apply for changing the quote.

UPDATE CUSTOMER QUOTE PRICING:

If a price update is received, quotes within the quote summary screen can be selectively updated with new prices. This is done through the QUOTE menu function.



SPECIAL COMMITMENT DISCOUNTS:

Requests for Special Commitment discounts can be submitted to NOMS from HERO. To create a request, from the SC Summary screen, select the “+” icon.

The screenshot shows the 'Hyster Electronic Retail Organizer' application window. At the top is a menu bar with 'File', 'Function', 'Special Commitments', 'ITA', 'Reports', 'Utilities', and 'Help'. Below the menu bar is a toolbar with a 'Create New Special Commitment' icon. A dialog box is open with the title 'Create New Special Commitment'. It contains a 'Customer' dropdown menu with 'A NEW CUSTOMER' selected, and 'OK' and 'Cancel' buttons. Below the dialog box is a table with the following columns: 'Xmit', 'Req #', 'Customer', 'SC #', 'Salesperson', 'Entry Date', 'Apv Date', and 'Start Date'. The table is currently empty. At the bottom of the window is a control panel with 'Status' (All, Unexp, Exp), 'Transmit Status' (All, New, Queue, Tx, Ack), and 'Date Range' (All, Entry Date, MM/DD/YY to MM/DD/YY). There are also navigation buttons (Find, Only, All) and a 'Multj' button with a 'Sort' dropdown menu set to 'cust'.

Select the customer you are requesting the discount for. Reply OK and you will get a pending SC discount request.

Special Commitment Request

Request # Request Date Start Date Transmit ☐
 SC # Response Date End Date Approved ☒ U
 Approval Date Cancel Date Pending ☐

Customer Parent

Salesperson Approval
 Requestor Password

Details				Competitor Information						Comments
	Series	Model	Series Qty	Req % Cust	Req % Bill-To	Req % Dlv Dlr	Apv % Cust	Apv % Bill-To	Apv % Dlv Dlr	Special Option Comment
*										

Select the model and series involved, and complete the requested quantity and discount data. Use the Special Option Comment field to note any specific option information that may be pertinent.

Special Discount requests must be approved before being transmitted to NOMS. This approval function can only be performed by an authorized dealership employee. Authorization security is provided in the User Table.

COMPETITOR DATA:

Special Commitment Request							
Request #	100001	Request Date		Start Date		Transmit	☐
SC #		Response Date		End Date		Approved	U
		Approval Date		Cancel Date		Pending	☐
Customer				A NEW CUSTOMER, OMAHA, NE USA			
Parent							
Salesperson				Not Assigned			
Requestor							
Approval				Password			
Approve							
Details		Competitor Information			Comments		
Series	Competitor Code	Competitor Discount Pct	Order Gross Value	Comment			
B199							
*	ATL	ATLET					
	BAK	BAKER					
	BAL	BALKANCAR					
	BAR	BARRETT					
	BIG	BIG JOE					
	BLU	BLUE GIANT					
	BTPM	BT/PRIME MOVER					
	CAT	CATERPILLAR					

For each requested series discount, enter the Competitor discount information either by discount percent or gross amount. Competitor code can be selected from the competitor table. Use comments field to provide information critical to justification of discount request.

Special Commitment Request			
Request #	100001	Request Date	
SC #		Response Date	
		Approval Date	
		Start Date	
		End Date	
		Cancel Date	
		Transmit	☐
		Approved	☒
		Pending	☐
		Help	OK
		Print	
Customer		A NEW CUSTOMER, OMAHA, NE USA	
		Parent	
Salesperson		Not Assigned	
Requestor			
		Approval	
		Password	
		Approve	
Details		Competitor Information	
Comments			
	Comment	Date	Type
*			

Note: If a Discount Authorization (SC) Request originates from HERO the assignment process is not necessary. The customer assignment is completed when the request is created. If the SC was requested by phone you must assign the correct HERO customer to the discount authorization that you will be using on your Order Request. SC discounts requested via phone begin with NA-.

1. Select SC icon [%] on the HERO task bar to display SC summary screen.
2. Highlight the SC record that you want to assign.
3. Select Special Commitments * Assign to Customer (Located above task bar)
4. From list select customer to be assigned to SC (Must be same customer quoted).
5. Select OK button to assign.

The NA - will disappear and the correct HERO customer name will now be displayed.

SPED QUOTES:

To view SPED quotes, select the SPED Quote icon. All quotes within the HERO system will be displayed in Customer Name and Quote number sequence. Quotes that are due to expire within the next 5 days will display the expiration date in red.

Highlighting a quote / item entry will show the full item text on the lower half of the screen.

Expired quotes will continue to display on the summary screen, but may not be accessed when preparing a new customer quote.

As SPED quotes are received from NOMS, since they are not directly tied to a customer code within HERO system, they will need to be *Assigned* to the correct customer record within HERO before they can be used for quoting purposes. These can be identified with the “NA -” prefix in the Customer Name field. As each entry is assigned to a customer using the ASSIGN button, the “NA” prefix will be removed.

Note: The SPED Quote items (options) must be added to your truck quote within the Truck Specification Builder (TSB). To locate the appropriate category for the item select the “**SQ Opt List**” button at the bottom of the TSB screen. This will display the SPED Quote item list. The category column will provide the category name that will be used to locate the item. Return to the TSB and scroll down the Cat ID section (Top-Left) until you reach the appropriate category. Select the category (Category Description) to display the SPED Quote items in the options section (Top-Right). To add item to truck quote; highlight item and select Add button or double-click item.

CONVERT QUOTE TO ORDER:

USING DEALER STOCK:

Quote # F10000 Transmit ☐ Type F ☒ Use Dlr Stock Print Help OK

Customer A NEW CUSTOMER
Parent Co.
Salesperson Not Assigned FOB Loc Will Advise
Terms Delivery FOB
Description

Create new E100XL2 order
Qty 1
Requested Delivery Date 03/06/98
OK Cancel

Series	Model	Qty	Won	Lost	Dead	Prob%	Condition	Status	Quote Amount	Model Close Date	Price Date
C098	E100XL2	1	0	0	0	50	New	Quote	\$47,490.00		03/06/98

Add Model Selected Model Won / Lost Details Financial Worksheets
Base Templates Truck Options **Order** Delete Model Summary Model Summary

Before converting a quote to an order, if a unit from dealer stock will be used, click the USE DLR STOCK button, then click the ORDER button. HERO will prompt for the stock order to be used, rather than create a new order on the HERO system. Only STOCK or DISPLAY orders that are not flagged as and customer = Y can be used. Orders must be from the same series, but not necessarily the same model.

After a stock truck is used in the quote conversion process, the order will need to be updated to meet the customer specs and transmitted to NOMS if not already shipped from the factory. **Note: Until further notice Fax this order change to Hyster.**

CREATING A NEW FACTORY ORDER:

The screenshot shows the 'Quote Header' window. At the top, there are fields for 'Quote #', 'Transmit', 'Type', and 'Use Dir Stock'. Below these are fields for 'Customer', 'Parent Co.', 'Salesperson', 'FOB Loc', 'Terms', 'Delivery', and 'Description'. A red box highlights a dialog titled 'Create new E100XL2 order' which contains 'Qty' (set to 1) and 'Requested Delivery Date' (set to 03/06/98) with 'OK' and 'Cancel' buttons. Below the header is a table with columns: Series, Model, Qty, Won, Lost, Dead, Prob%, Condition, Status, Quote Amount, Model Close Date, and Price Date. The first row shows 'C098', 'E100XL2', '1', '0', '0', '0', '50', 'New', 'Quote', '\$47,490.00', and '03/06/98'. The 'Won' column is highlighted with a red box. At the bottom, there are buttons for 'Add Model', 'Selected Model', 'Won / Lost Details', and 'Financial Worksheets'. The 'Order' button under 'Selected Model' is circled in red.

Series	Model	Qty	Won	Lost	Dead	Prob%	Condition	Status	Quote Amount	Model Close Date	Price Date
C098	E100XL2	1	0	0	0	50	New	Quote	\$47,490.00		03/06/98

To convert a quote to an order, from the quote header screen, select the ORDER button. In the top right corner, specify the order quantity and the requested delivery date, then click OK.

Reminder: The order process may ONLY commence from the HERO Host system.

HERO will advise you of the order number(s) created. Each order to NOMS is for a quantity of 1. It will then ask if you want to proceed to order edit. If yes, it will take you to order edit for the last order created.

For closure and awareness, the WON column is automatically updated for the order quantity.

If the entire quantity for a model is being ordered, the system will close the quote record for that model from any further update activity. If all models for a quote have been closed, then the quote also is closed from further update activity.

UPDATE ORDER SPECS:

Xmit	Req #	Customer	Cust City	St	Order #	Received	Req Deliv	Model
	100000	A NEW CUSTOMER	OMAHA	NE			03/06/98	E100XL2

To update an order, highlight the order to be updated and either double click on it or click on the REVIEW/EDIT ORDER icon.

Note: If you created an order within HERO in error or one requiring Option modifications it can be deleted providing it has not been transmitted. Option changes must be done within the Quote.

To delete Order: Highlight the Order from Orders Summary screen and left mouse-click the Trash Can Icon. You will be prompted to confirm Order deletion. If you select Yes to delete the Order you will receive a message that HERO will re-open the Quote. Any Option additions/changes must be done within the Quote and then converted to an Order again once modifications are completed.

ORDER HEADER:

The Order Header screen contains general order information. Order discount information can be maintained by specifying discount type (Disc Type). Based on the discount type selected, HERO will prompt for additional data. **Discount Authorization** (AUT) or **Discount Matrix** (MAT) selection is provided from Disc Type drop-down arrow. The requested delivery date defaults to current date, but can be modified for future requested delivery date.

Stat	Option / SUR	Itm #	Description	Op St	Qty	List Price	Disc %	Net Value	Dimen	Opt Type
A	05103		E100KL2		1	\$41625.00	44.00	\$23310.00		F
A	05201		36 VOLT		1	\$0.00	44.00	\$0.00		F
A	03201		DIRECTIONAL		1	\$0.00	44.00	\$0.00		F
A	02803		AS CONTROLS		1	\$0.00	44.00	\$0.00		F
A	04701		HOIST CONTROL-CONTACTOR		1	\$0.00	44.00	\$0.00		F
A	02401		FIELD WEAKENING		1	\$180.00	44.00	\$100.80		F
A	02101		PARK BRAKE-MANUAL		1	\$0.00	44.00	\$0.00		F
A	08001		BATTERY INDICATOR		1	\$0.00	44.00	\$0.00		F
A	05601		UL APPROVAL-E		1	\$0.00	44.00	\$0.00		F
A	05601		UL APPROVAL-E		1	\$0.00	44.00	\$0.00		F

Across the lower half of the screen are tabs for Options, Option Comments, Order Comments, Ship-To data, TERMS data, and Order Approval.

ORDER OPTIONS:

Order options may be maintained to change the sourcing of an option. All options default to “factory sourcing” when converted from a customer quote. If an option is being supplied from dealer inventory, the Option Type must be changed to “D” before it is transmitted to NOMS.

OPTION COMMENTS:

Order Options / Values

Order Request #	100000	Quote #	F10000	Series	C098	Transmit	☐
Received Date		SC Req #		Model	E100XL2	Pending	☐
Hyster Order #		SC End Date		Promised		Req Deliv	03/06/98
Customer	A NEW CUSTOMER			Price Book	DOM	Price Date	03/06/98

Disc Type	STD	Option Gross	\$47,465.00
Warranty	\$0.00	Effect Disc %	44.00
Other	\$25.00	Option Net	\$26,580.40
Freight Allow	\$0.00		
Net Misc	\$25.00	Net Freight	\$0.00
		Order Value	\$26,605.40

Options	Option Comment	Order Comments	Ship-To	Terms	Approval
---------	-----------------------	----------------	---------	-------	----------

05103 E100XL2 [Navigation Buttons] Print Options

Option Comment
*

Note: It is recommended buy Hyster Product Supply that **ALL** comments be entered in the Order Comments area.

Comments text can be loaded to an individual option. The option must be highlighted in the Option Tab before going to the Option Comment tab. An example of option comments might be supplying paint codes for a special paint option.

ORDER COMMENTS:

Order Options / Values																													
Order Request #	100000	Quote #	F10000	Series	C098	Transmit	☐	OK																					
Received Date		SC Req #		Model	E100XL2	Pending	☐																						
Hyster Order #		SC End Date		Promised		Req Deliv	03/06/98	Help																					
Customer	A NEW CUSTOMER			Price Book	DOM	Price Date	03/06/98	Milestones																					
Disc Type	STD	Warranty	\$0.00	Option Gross	\$47,465.00																								
		Other	\$25.00	Effect Disc %	44.00																								
				Option Net	\$26,580.40																								
				Freight Allow	\$0.00																								
		Net Misc	\$25.00	Net Freight	\$0.00																								
				Order Value	\$26,605.40																								
<table border="1"><tr><td>Options</td><td>Option Comments</td><td>Order Comments</td><td>Ship-To</td><td>Terms</td><td>Approval</td></tr></table>										Options	Option Comments	Order Comments	Ship-To	Terms	Approval														
Options	Option Comments	Order Comments	Ship-To	Terms	Approval																								
<table border="1"><tr><td>Comment</td><td colspan="9">Print Options</td></tr><tr><td>*</td><td colspan="9"></td></tr></table>										Comment	Print Options									*									
Comment	Print Options																												
*																													

Comments pertaining to the entire order, including Attachment Nameplate information, are entered on the Order Comments screen

SHIP TO INFORMATION:

Order Options / Values

Order Request #	100000	Quote #	F10000	Series	C098	Transmit	☐
Received Date		SC Req #		Model	E100XL2	Pending	☐
Hyster Order #	999999	SC End Date		Promised		Req Deliv	03/06/98
Customer	A NEW CUSTOMER	Price Book	DOM	Price Date	03/06/98		

Disc Type: STD

Warranty: \$0.00
Other: \$25.00

Option Gross: \$47,465.00
Effect Disc %: 44.00
Option Net: \$26,580.40

Freight Allow: \$0.00
Net Misc: \$25.00
Net Freight: \$0.00
Order Value: \$26,605.40

Options | Option Comments | Order Comments | **Ship-To** | Terms | Approval

Select: A NEW CUSTOMER Apply To: Booking Cust | Deliv Ship-To | EC Ship-To | New Cust

Stat	Type	Qty	Pnd	Customer Name and Address	SIC	Comment
A	Booking	1	0	A NEW CUSTOMER, 1234 HERO LANE, OMAHA, NE 99999	9999	
A	Del Ship	1	0	ACME DEALERSHIP, 7531 146TH AV NE, OMAHA, NE 99999	9999	
A	EC Ship	1	0	A NEW CUSTOMER, 1234 HERO LANE, OMAHA, NE 99999	9999	

Three sets of Names and Addresses are supplied in the Ship-to screen.

Booking Customer: Name and address of the customer for ITA Retail Booking purposes.

Delivery Ship-to: Name and Address of the location where the manufacturing plant is to ship the product.

End Customer Ship-to: Name and Address of the customer location where the product will be placed in service (ITA Retail Delivery).

Names and Addresses are selected from the Customer table using the “pull-down” arrow. Highlight the desired Name and Address record and click on the appropriate button to apply the selected data to Customer, Delivery Ship-to, or End Customer Ship-to. If the Customer Name and Address does not exist in the Customer table, click on NEW and add it to the table first before doing the selection.

Default Delivery Ship-to: There is a selection under the Customer drop down (Customer Summary) to establish a default Delivery Ship-to record. This should be done by the Host system and setup for the dealership location that receives the majority of truck deliveries.

ORDER TERMS INFORMATION:

Order Options / Values															
Order Request #	100000	Quote #	F10000	Series	C098	Transmit	☐	OK							
Received Date		SC Req #		Model	E100XL2	Pending	☐								
Hyster Order #		SC End Date		Promised		Req Deliv	03/06/98	Help							
Customer	A NEW CUSTOMER			Price Book	DOM	Price Date	03/06/98								
Disc Type	STD	Warranty	\$0.00	Option Gross	\$47,465.00	Effect Disc %	44.00	Milestones							
		Other	\$25.00	Option Net	\$26,580.40										
		Freight Allow	\$0.00	Net Misc	\$25.00	Net Freight	\$0.00	Order Value	\$26,605.40						
<table border="1"> <tr> <td>Options</td> <td>Option Comments</td> <td>Order Comments</td> <td>Ship-To</td> <td>Terms</td> <td>Approval</td> </tr> </table>										Options	Option Comments	Order Comments	Ship-To	Terms	Approval
Options	Option Comments	Order Comments	Ship-To	Terms	Approval										
Order Type: R Payment Terms: 1% 10 Net 30 Delivery Method: F Freight Carrier: ROLS - CALIBER Freight Pay Method: C FOB Point: P Rental Order?: N End Cust Order?: Y					Bill-To: ACME DEALERSHIP 7531 146TH AV NE POB 3189 OMAHA, NE 68114 Bill-To PO: End Cust PO:										

On the TERMS tab, specify Payment Terms, Delivery Method, and enter the Dealer or National Account Purchase Order number.

If the order is sold, enter "Y" in the End Customer Order? Field. If it is a unit for the dealership rental fleet, set Rental Order to "Y". Enter Bill-To PO number (required & must be unique) and/or End Customer P.O. (not required).

Default values are as follows:

<u>Delivery Method</u>	<u>Default Freight Pay Method</u>
D (Dealer Pick-Up)	C (Collect)
E (Customer Pick-Up)	C (Collect)
F (ROLS – CALIBER)	A (Prepaid; Add to invoice)

Note: New Payment Terms for Hyster Capital:

Hyster Capital Display
Hyster Capital Rental

ORDER APPROVAL:

Order Options / Values									
Order Request #	100000	Quote #	F10000	Series	C098	Transmit	☐	OK	
Received Date		SC Req #		Model	E100XL2	Pending	☐		
Hyster Order #		SC End Date		Promised		Req Deliv	03/06/98	Help	
Customer	A NEW CUSTOMER			Price Book	DOM	Price Date	03/06/98		
Disc Type	STD	Warranty	\$0.00	Option Gross	\$47,465.00				
		Other	\$25.00	Effect Disc %	44.00				
				Option Net	\$26,580.40				
				Freight Allow	\$0.00				
		Net Misc	\$25.00	Net Freight	\$0.00				
				Order Value	\$26,605.40				
Options Option Comments Order Comments Ship-To Terms Approval									
Approval									
Password				Approve		Timestamp			
Nomenclature					Model Quantity				
Order Booked					Quote	1	Qty Changed		
Acknowledged					Current	1			
Cancel Date					Original	1			
Override Comp					Pending	0			
					Shipped	0			
					Invoiced	0			

Once the order has been updated and is ready to transmit to HERO-NOMS, Order Approval is done by an authorized user at the dealership. Enter the user's password and click the APPROVE button. This sets the order to approved status and flags it as queued for transmission on the next connection to HERO-NOMS. If further updating is needed before it is transmitted to HERO-NOMS, it can be unapproved (unlocked) and further editing done. In this case, it will have to be re-approved to transmit to HERO-NOMS.

ORDER CHANGE:

Currently, Hyster Company asks that you continue to use the current methods in effect (Fax or Email) to submit order changes. *The Order Changes listed below should be submitted via Email to the corresponding specialist based on Class and Truck model.*

- ⌚ Order cancellation
- ⌚ Payment terms
- ⌚ Option spec change (both Production and SPED Price List options)
- ⌚ SPED Quote change
- ⌚ Changes to Booking Customer, Delivery Ship-to, and End Customer Ship-to

CLASS I	PLANT	SERIES	PRIMARY SPECIALIST	e-mail Address	PHONE (252) 931-	SUPER-VISOR
E25-40XM2S	010	D114	DELYNN CARTER	aadcarte@nmhg.com	5737	L. HAGEN
E30FR2	015	V943	CLIFF DENNEY	aacdenne@nmhg.com	5763	L. HAGEN
E35-50FR	015	Z943	CLIFF DENNEY	aacdenne@nmhg.com	5763	L. HAGEN
E45-65XM2	010	F108	NANCY TRIPP	aantripp@nmhg.com	5735	L. HAGEN
E70-120XL	010	C098	NANCY TRIPP	aantripp@nmhg.com	5735	L. HAGEN
J30-40XMT2	072	H160	LISA SADLER	aalsadle@nmhg.com	5743	T. COSTIN
J40-60XM	055	A216	SAMMIE STARR	aasstarr@nmhg.com	5767	T. COSTIN

CLASS II

N30XMH2	010	C210	BOBBIE BULLOCK	aabbullo@nmhg.com	5750	L. HAGEN
N25XMDR2,N30-40XMR2	072	B470	LISA SADLER	aalsadle@nmhg.com	5743	T. COSTIN
N50XMA2	072	B471	LISA SADLER	aalsadle@nmhg.com	5743	T. COSTIN
N45XMR2, N30XMDR2	072	F138	LISA SADLER	aalsadle@nmhg.com	5743	T. COSTIN
N45XMXR, N30XMXDR	072	A264	LISA SADLER	aalsadle@nmhg.com	5743	T. COSTIN
R30XMS2	072	D174	LISA SADLER	aalsadle@nmhg.com	5743	T. COSTIN
R30XM,XMA,XMF	072	F118	LISA SADLER	aalsadle@nmhg.com	5743	T. COSTIN
V30XMU	046	A467	CLIFF DENNEY	aacdenne@nmhg.com	5763	L. HAGEN
V35XMU	046	A468	CLIFF DENNEY	aacdenne@nmhg.com	5763	L. HAGEN
V40XMU	046	A469	CLIFF DENNEY	aacdenne@nmhg.com	5763	L. HAGEN

CLASS III

W40XT	072	A218	LISA SADLER	aalsadle@nmhg.com	5743	T. COSTIN
W45XT	072	B215	LISA SADLER	aalsadle@nmhg.com	5743	T. COSTIN
W60-80XT	072	E135	LISA SADLER	aalsadle@nmhg.com	5743	T. COSTIN
W20-40XTA	072	A453	LISA SADLER	aalsadle@nmhg.com	5743	T. COSTIN
W20-40XTC	072	A454	LISA SADLER	aalsadle@nmhg.com	5743	T. COSTIN
W20-30XTR	072	A455	LISA SADLER	aalsadle@nmhg.com	5743	T. COSTIN
B80XT	072	B199	LISA SADLER	aalsadle@nmhg.com	5743	T. COSTIN
C60-80XT	072	A499	LISA SADLER	aalsadle@nmhg.com	5743	T. COSTIN
B60Z	072	A230	LISA SADLER	aalsadle@nmhg.com	5743	T. COSTIN
W60Z	072	A231	LISA SADLER	aalsadle@nmhg.com	5743	T. COSTIN
T5XT	072	E142	LISA SADLER	aalsadle@nmhg.com	5743	T. COSTIN

CLASS IV

S25-40XM(S)	072	C010	SANDI TODD	aastodd@nmhg.com	5747	T. COSTIN
S40-65XM	010	D187	DELYNN CARTER	aadcarte@nmhg.com	5737	L. HAGEN
S70-120XL2	004	D004	CLIFF DENNEY	aacdenne@nmhg.com	5763	L. HAGEN
S135-155XL2	004	B024	CLIFF DENNEY	aacdenne@nmhg.com	5763	L. HAGEN

CLASS V

H25-40XMS	072	D001	SANDI TODD	aastodd@nmhg.com	5747	T. COSTIN
H45-65XM	049	H177	SAMMIE STARR	aasstarr@nmhg.com	5767	T. COSTIN
H70-110XM	004	K005	CAROLYN ALLEN	aacallen@nmhg.com	5733	L. HAGEN
H135-155XL2	004	F006	CAROLYN ALLEN	aacallen@nmhg.com	5733	L. HAGEN
H165-280XL2	004	E007	CAROLYN ALLEN	aacallen@nmhg.com	5733	L. HAGEN
H300-360XL2	004	D019	CAROLYN ALLEN	aacallen@nmhg.com	5733	L. HAGEN
H360-450H	051	A214	BRUCE MILLIS	ahbmilli@hyster.com	217/443-7281	S MCCONKEY
H440-700F	004	E008	BRUCE MILLIS	ahbmilli@hyster.com	217/443-7281	S MCCONKEY
H800-1050E	051	D117	BRUCE MILLIS	ahbmilli@hyster.com	217/443-7281	S MCCONKEY
YARDMASTER	701	A227/A228	BRUCE MILLIS	ahbmilli@hyster.com	217/443-7281	S MCCONKEY

FAX NUMBER: 252-931-5775

SUPERVISORS: LINDA HAGEN aalhagen@nmhg.com 252-931-5717

TERESA COSTIN aatcosti@nmhg.com 252-931-5736

ORDER SCHEDULE:

Bill-To	350000	Series	C098	Serial #		OK
Order Request #	100000	Model	E100XL2	Promise Date		

Milestone Sequence	Description	Actual Completion Date	Plant Number
--------------------	-------------	------------------------	--------------

Order milestone dates will be updated on HERO as an order progresses through the manufacturing cycle. The dates and unit serial number will be shown on the Order Schedule screen. This data will be refreshed on HERO with each NOMSLINK connection when Milestones are downloaded from NOMS.

Only the National Account offices will enter Commission data. Bring up this screen by pressing the NATL ACCT button on the Order Options/Values screen.

National Account Order Information - Commission Changes Allowed							
Trade-In Details							
	Make	Model	Serial Number	Value			
*							
				OK Help			
				Trade-In Total \$0.00			
Commission Detail							
	Type	Receiving Bill To	Based On Amt Or Pct	Percent	Amount	Auto Recalc If Ord Chg	Status
*							

Trade-In Details:

Enter the details of any trade-in unit(s) associated with the Order. Enter Make (there is a pull-down), Model, Serial number, and Value of each trade-in unit. This trade-in information will be uploaded to NOMS with the order and will appear on the NOMS Order Trade-In screen. It will be used in calculating the Commission amount.

Commission Detail:

Enter a detail line for each type of commission as follows:

[illegible]

Receiving Bill To: Bill-to Code where the commission amount will be directed

Based on Amt or Pct: **A** = Based on Amount **P** = Based on Percent

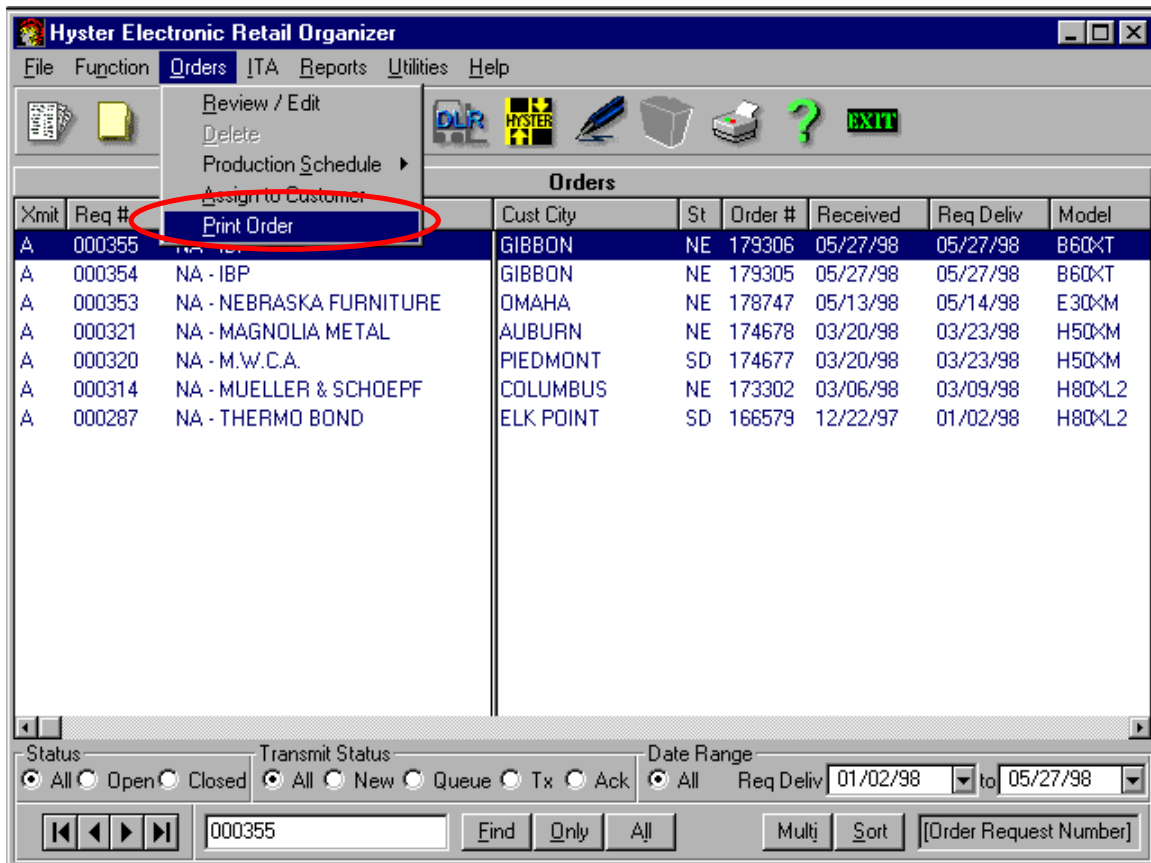
Percent: Enter actual percent or zero.

Amount: Enter an amount if *Based on* = A. Will be automatically calculated if *Based on* = P.

Auto Recalc If Ord Chg: Enter 'Y' if amount is to be recalculated when order changes, otherwise leave blank.

This commission detail will be uploaded to NOMS with the order and will appear on the NOMS Order Commission screen. It will be used in calculating the Commission amount.

ORDER CONFIRMATION PRINT:



Hyster Electronic Retail Organizer

File Function Orders ITA Reports Utilities Help

Review / Edit
Delete
Production Schedule
Assign to Customer
Print Order

Xmit	Req #	Cust City	St	Order #	Received	Req Deliv	Model
A	000355	GIBBON	NE	179306	05/27/98	05/27/98	B60XT
A	000354	GIBBON	NE	179305	05/27/98	05/27/98	B60XT
A	000353	OMAHA	NE	178747	05/13/98	05/14/98	E30XM
A	000321	AUBURN	NE	174678	03/20/98	03/23/98	H50XM
A	000320	PIEDMONT	SD	174677	03/20/98	03/23/98	H50XM
A	000314	COLUMBUS	NE	173302	03/06/98	03/09/98	H80XL2
A	000287	ELK POINT	SD	166579	12/22/97	01/02/98	H80XL2

Status: ☒ All ☐ Open ☐ Closed Transmit Status: ☒ All ☐ New ☐ Queue ☐ Tx ☐ Ack Date Range: ☒ All Req Deliv: 01/02/98 to 05/27/98

000355 Find Only All Multj Sort [Order Request Number]

When submitting orders electronically through HERO, it is recommended that a copy of the order should always be printed for audit purposes. You will continue to receive order acknowledgements from Hyster via the HSN.

This **PRINT ORDER** function can be used at any time to generate a copy of the order spec.

1 of 1 60% Total:13 100% 13 of 13

H.E.R.O. Equipment Order Confirmation

07/06/98

Order Request # 000355 **ORDER NUMBER 179306** **Customer PO**

Bill-To: 350000 **End Customer:** IBP
 FEHRS NEBRASKA TRACTOR &
 4115 SOUTH 90TH ST.
 OMAHA, NE 68127-1391 **GIBBON NE 68840**

Booking: IBP **Delivering Dealer:** FEHRS NEBRASKA TRACTOR
 EAST HWY 30 4115 SOUTH 90TH
 GIBBON NE 68840 **OMAHA NE 68127**

Model: B60XT Qty: 1

Item	Spool Quote #	Item	Option #	Qty	Description
1			05101	1	B60XT
2			03048	1	48" LONG X 27" WIDE FORKS
3			11103	1	HEAVY DUTY PULL RODS 48" FORKS
4			02003	1	FOOD PROCESSING
5			08003	1	BID W/LIFT INTERRUPT & HR. METER
6			01601	1	BUTTERFLY TYPE ACCELERATOR
7			02301	1	SINGLE LOAD WHEEL
8			02713	1	32" X 13.4" BATTERY COMPARTMENT
9			04902	1	STABILIZERS - CASTERS
10			05601	1	UL E APPROVAL
11			06102	1	POLYURETHANE DRIVE TIRE
12			60002	1	WARRANTY: 12 MO, 2000 HRS
13			00401	1	MARKETING SERVICES FEE

081 1

A sample copy of the printed Order Confirmation document is shown above.

ITA DATA:

ITA data will be downloaded monthly from the HERO NT Server by each dealership using NOMSLINK. The data will update the HERO database and provide information for the MIDAS reports.

ITA (MIDAS) ASSIGNMENTS:

The screenshot shows the 'ITA Assignments' window. At the top, there are radio buttons for 'Rep Assignments' (selected) and 'Branch Assignments'. To the right of these are buttons for 'Print', 'Assign Customers', 'Goals', 'Market', 'Trade Areas' (highlighted), and 'OK'. Below the controls are two tables. The first table, 'Sales Representative Assignments', has columns: St, County, Total %, Rep1, %, Rep2, %, Rep3. The second table, 'Branch Assignments', has columns: St, County, Total %, Branch1, %, Branch2, %, Branch3. Both tables list counties: ADAMS, ANTELOPE, ARTHUR, BANNER, BLAINE, BOONE, BOX BUTTE, and BOYD, all with a Total % of 0.

St	County	Total %	Rep1	%	Rep2	%	Rep3
NE	ADAMS	0		0		0	
NE	ANTELOPE	0		0		0	
NE	ARTHUR	0		0		0	
NE	BANNER	0		0		0	
NE	BLAINE	0		0		0	
NE	BOONE	0		0		0	
NE	BOX BUTTE	0		0		0	
NE	BOYD	0		0		0	

St	County	Total %	Branch1	%	Branch2	%	Branch3
NE	ADAMS	0		0		0	
NE	ANTELOPE	0		0		0	
NE	ARTHUR	0		0		0	
NE	BANNER	0		0		0	
NE	BLAINE	0		0		0	
NE	BOONE	0		0		0	
NE	BOX BUTTE	0		0		0	
NE	BOYD	0		0		0	

In the assignment process, Branch and Sales Rep records are assigned to State and County records by percentage of coverage. This information is then used to create the ITA (MIDAS) reports.

The Assign Customers button will allow for assigning all customers in a county to a Sales Rep or Branch. To do this, assign the Sales Rep or Branch to an entire county (100%) and press the Assign Customers button while having the cursor positioned on that county.

ITA ASSIGNMENTS: GOALS

ITA Assignments

Year
1998

OK

Branch Goals

Hyster

Industry

Branch	I	II	III	IV	V	I	II	III	IV	V
PLATTE FALLS										
FARGO										
OMAHA										

Print

Sales Representative Goals

Hyster

Industry

Sales Rep	I	II	III	IV	V	I	II	III	IV	V
Sales Rep 1										
Sales Rep 2										

Trade Area Goals

Hyster

Industry

Trade Area	I	II	III	IV	V	I	II	III	IV	V
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Print

Goals are maintained by Sales Rep, Branch, and Trade area for each ITA class. This data is used in generating the MIDAS reports.

ITA ASSIGNMENTS: MARKET INFORMATION

ITA Assignments

Market Information

☒ Bookings ☐ Deliveries

Print OK

		----- Hyster -----					----- Industry -----					
St	County	Month	I	II	III	IV	V	I	II	III	IV	V

Shows Hyster versus Industry data as provided on a monthly basis by ITA. Data is arranged by State/County and will display both Booking and Delivery data based on the button selected. This data is maintainable to fix ITA reporting problems, but the data is downloaded fresh each month, so if ITA doesn't make the correction permanently, any change made to this data will be lost.

ITA ASSIGNMENTS: TRADE AREAS

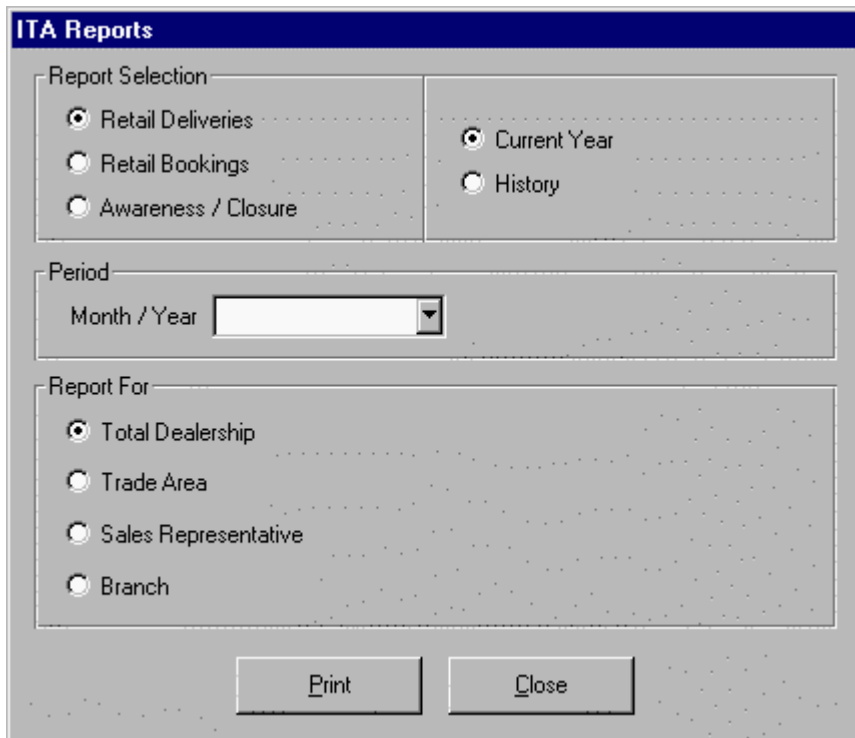
Trade Area Definition

OK

Trade Area	State / Country - Trade Area Assignments		
*	State	County	Trade Area
	NE	ADAMS	
	NE	ANTELOPE	
	NE	ARTHUR	
	NE	BANNER	
	NE	BLAINE	
	NE	BOONE	
	NE	BOX BUTTE	
	NE	BOYD	
	NE	BROWN	
	NE	BUFFALO	
	NE	BURT	
	NE	BUTLER	
	NE	CASS	
	NE	CEDAR	
	NE	CHASE	
	NE	CHERRY	
	NE	CHEYENNE	
	NE	CLAY	
	NE	COLLINS	

Use this function to maintain State/County assignments to Trade Areas.

ITA (MIDAS) REPORTS:



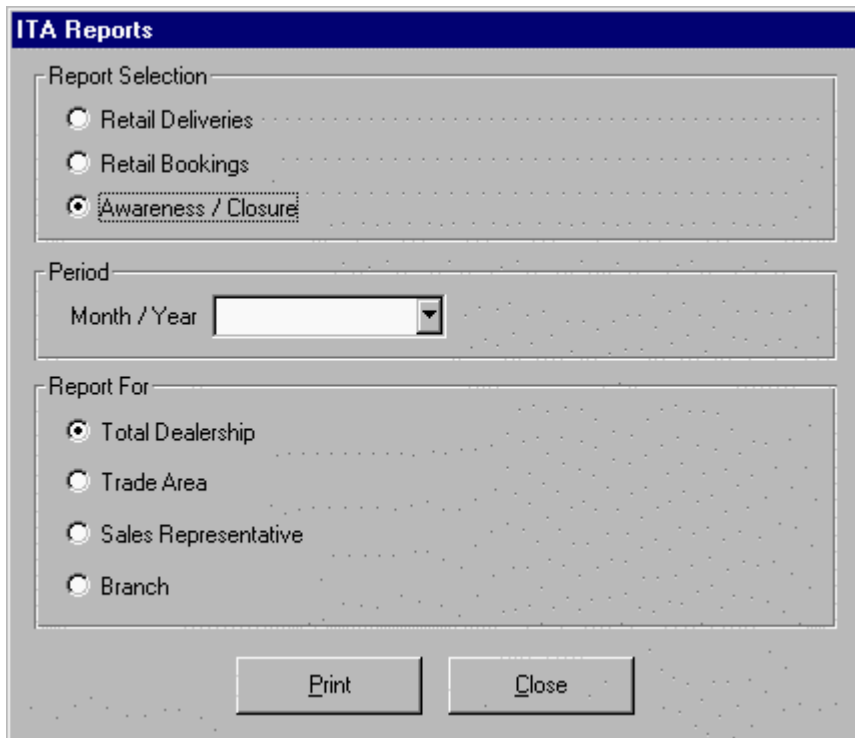
The image shows a software dialog box titled "ITA Reports". It contains three main sections: "Report Selection", "Period", and "Report For".

- Report Selection:** This section is divided into two columns. The left column contains three radio buttons: "Retail Deliveries" (selected), "Retail Bookings", and "Awareness / Closure". The right column contains two radio buttons: "Current Year" (selected) and "History".
- Period:** This section contains a label "Month / Year" followed by a text input field and a small downward-pointing arrow button.
- Report For:** This section contains four radio buttons: "Total Dealership" (selected), "Trade Area", "Sales Representative", and "Branch".

At the bottom of the dialog box, there are two buttons: "Print" and "Close".

MIDAS reports are generated by dealership, trade area, sales rep, or branch. Current Year to date, and prior years history is available for reporting purposes. Reports can be based on Retail Deliveries or Retail Bookings.

CLOSURE & AWARENESS:



The image shows a software dialog box titled "ITA Reports". It contains three main sections: "Report Selection", "Period", and "Report For". In the "Report Selection" section, three radio buttons are present: "Retail Deliveries", "Retail Bookings", and "Awareness / Closure", with the latter being selected. The "Period" section features a label "Month / Year" followed by a dropdown menu. The "Report For" section contains four radio buttons: "Total Dealership", "Trade Area", "Sales Representative", and "Branch", with "Total Dealership" being selected. At the bottom of the dialog box are two buttons labeled "Print" and "Close".

ITA Reports

Report Selection

☐ Retail Deliveries

☐ Retail Bookings

☒ Awareness / Closure

Period

Month / Year

Report For

☒ Total Dealership

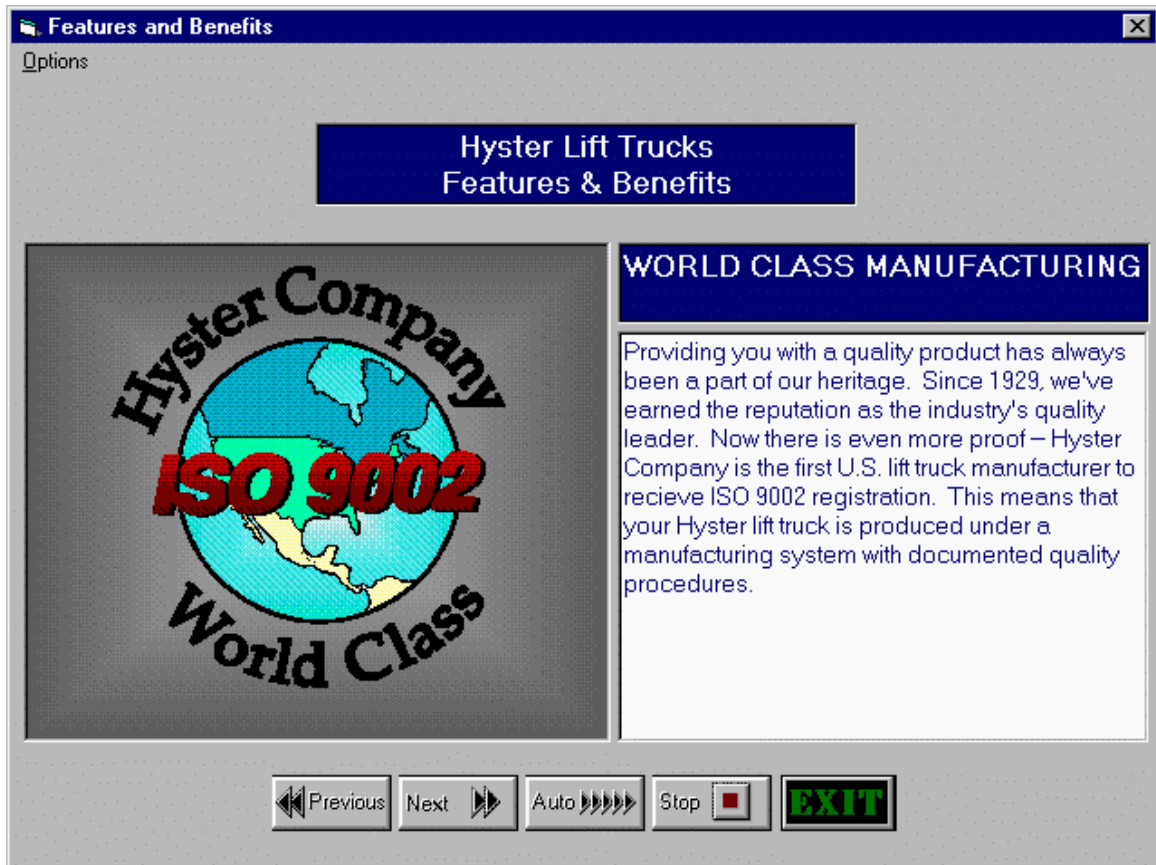
☐ Trade Area

☐ Sales Representative

☐ Branch

Awareness, Closure, and Market share reporting is available by dealership, trade area, sales rep, or branch. Current year history by month is available for reporting purposes.

HYSTER SLIDE SHOW:

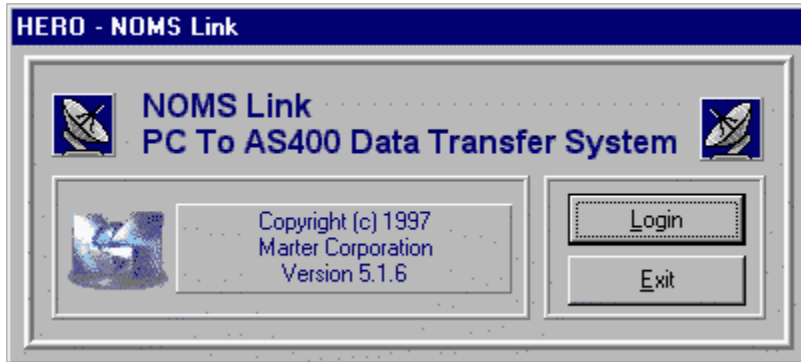


The Hyster Slide Show is a set of slides with accompanying text to present Hyster Company and its product highlights. It is not specific to a particular model or truck series. This functionality will be further enhanced after system roll out.

HEROLINK PROCESS

HEROLINK is the process used to interface data between the HERO System and NOMS. It is also used to send and receive data between different HERO systems within a Dealership (i.e. Host, Branch, and Sales Rep laptop PC's).

To start the HEROLINK function:



Login to HEROLINK.



Enter valid USER ID and PASSWORD, then click the OK button.

DOWNLOAD PRICE BOOK DATA:

HERO - NOMS Link

NOMSLink

Status: **Ready**

Current Table Rows: Complete [], Time []

All Tables: Complete [], Time [], **0%**

Buttons: **Start**, Exit, Download, Upload, **Pricebook**, JTA, Config

Price Book Download

Table Name	LastDownload	Records	Interrupted	Skip
Bill-To Extension		0		☒
Bill-To Valid St/County		0		☒
Category Required		0		☒
Competitor		0		☒
Discount Matrix		0		☒
Discount Matrix Level		0		☒
Discount Matrix Series		0		☒
Exclude Option Dependency		0		☒
Freight Allowance		0		☒
Freight Carrier		0		☒
Marketing Program		0		☒
Mkt Program Series Disc		0		☒
Model		0		☒
Option		0		☒
Option Category		0		☒

Radio Buttons: **Get updates since last download - OR -**, Completely reload tables

To update option pricing and compatibility logic and synchronize other HERO support files with NOMS,

1. Select Pricebook,
2. Choose whether to get updates since last NOMSLINK connection

or

Completely reload tables.

The default is get updates since last download.

Note: It is recommended that each HERO system process a “Completely reload tables” once a month. This will ensure that you have current pricing & compatibility.

Appropriate tables are automatically skipped when performing this download to avoid loss of any critical data.

3. Click START to begin download

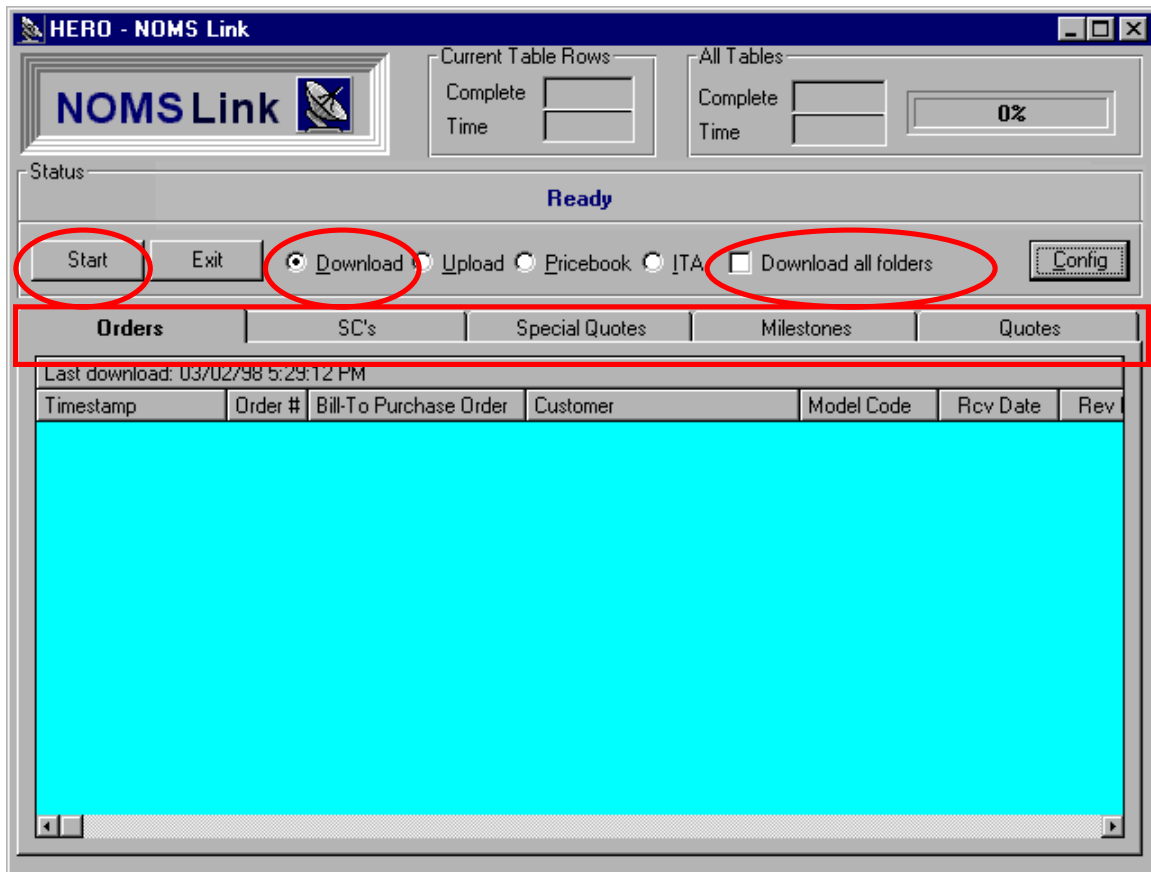
To save connect time and keep from completely rebuilding the tables each time, it is recommended you elect to receive updates since the last connection.

At HERO roll out, there are a few tables we have set to bypass on the download. Example: Bill-to Valid State/County. This defines a dealer's territory and would rarely change, so there is no need to check it on every connection and consume PC resources. However, in the event it does change, the bypass switch could be changed for one connection to pick up the NOMS changes, then changed back to bypass mode.

Suggested files to skip:

- ⌚ Bill-To Extension (Dealers only)
- ⌚ Bill-To Valid St/County
- ⌚ Competitor
- ⌚ Freight Allowance
- ⌚ Freight Carrier
- ⌚ Sales Territory
- ⌚ Standard Industry Code
- ⌚ US County Codes
- ⌚ US State Codes

HERO DOWNLOAD:



There is a specific order for the HEROLINK (NOMSLINK) process.

Note: It is recommended that the Pricebook be downloaded first.

Pricebook process

- 1) Download Pricebook data from HERO-NOMS
 - _ Select the Pricebook button
 - _ Click the Start button and enter NT User ID and Password
 - _ **Note:** Password must be lower case
 - _ Click Connect
- 2) The Download process consists of two parts:
 - A. Download data from HERO-NOMS
 - _ Orders
 - _ SC Discounts
 - _ SPED Quotes
 - _ Factory Milestones
 - B. Download data transferred from other dealership HERO systems
 - Customer Quotes

To Download data from HERO-NOMS:

- ⌚ Select the Download button

- ⌚ Select individual tabs for Orders, SC's, SPED Quotes, or Milestones

OR

- ⌚ Select DOWNLOAD ALL FOLDERS (**Recommended**) to download all tables during the same HEROLINK session. DOWNLOAD ALL FOLDERS also downloads Customer Quotes.

Download Customer Quotes from HERO:

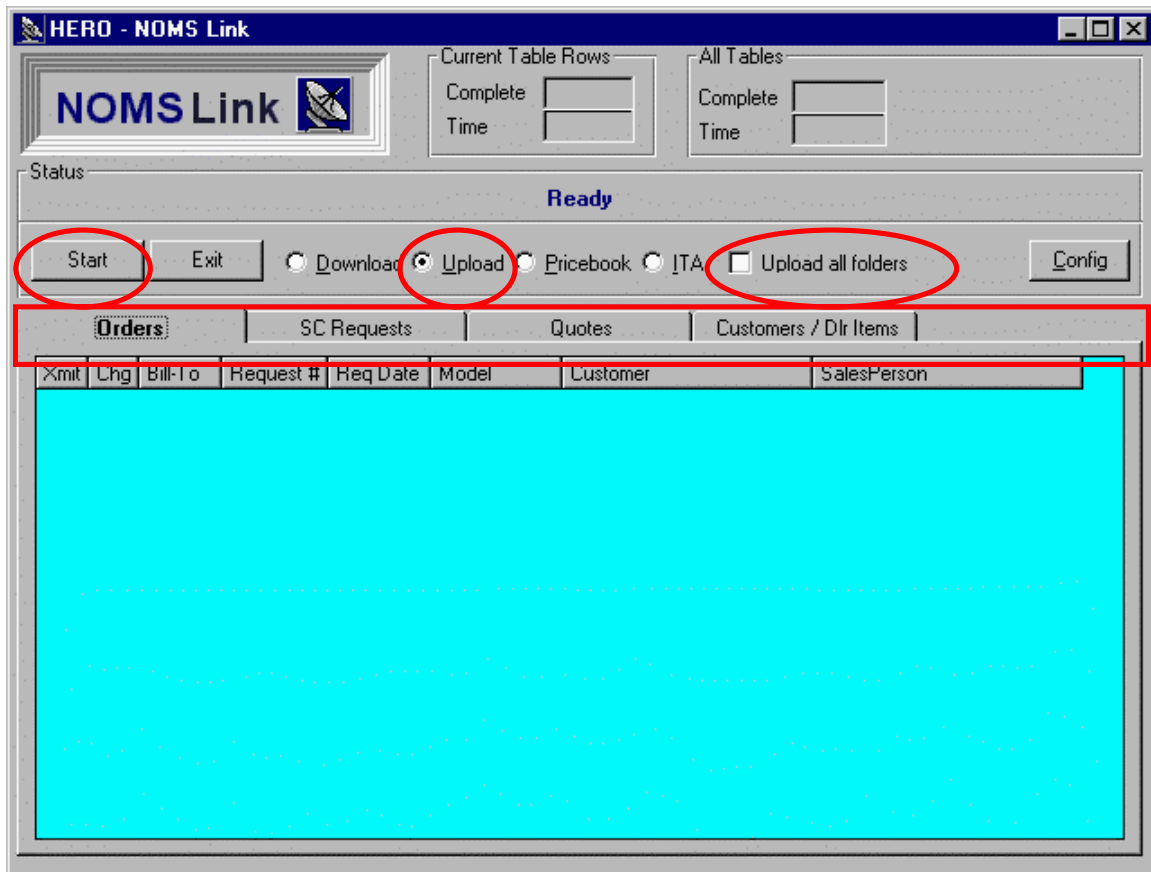
- ⌚ Select the Download button
- ⌚ Select individual tab for Quotes

OR

- ⌚ Select DOWNLOAD ALL FOLDERS to download all tables during the same HEROLINK session

Click the START button to begin the download. You will not be required to re-enter User ID and Password if download occurs in same session.

HERO UPLOAD:



The upload process consists of two parts:

1. Upload data to NOMS

⌚ Orders

Note: Transmit status sequence during upload:

Q = Queued for transmit to Hyster, **R** = Hyster receiving order, **T** = Order transmitted

⌚ SC Discount requests

2. Upload data to transfer to other dealership HERO systems

⌚ Customer Quotes (Example: Used to forward a customer quote from a Sales Reps laptop to the Dealer Host PC)

⌚ Dealer Item Tables (Only from Dealer Host to other Dealership HERO systems)

Upload data to NOMS:

⌚ Select the Upload button

⌚ Select individual tabs for Orders or SC's

OR

⌚ Select UPLOAD ALL FOLDERS button to upload all tables during the same NOMSLINK connection

⌚ Click the START button to begin the upload

Upload Customer Quotes from HERO:

⌚ Select the Upload button

⌚ Select individual tab for Quotes

OR

⌚ Select UPLOAD ALL FOLDERS button to upload all tables during the same NOMSLINK connection

⌚ Click the START button to begin the upload

Upload Customer and Dealer Item Data from HERO:

- ⌚ Select the Upload button
 - ⌚ Select individual tab for Customers/Dlr Items
- OR
- ⌚ Select UPLOAD ALL FOLDERS button to upload all tables during the same NOMSLINK connection
 - ⌚ Click the START button to begin the upload

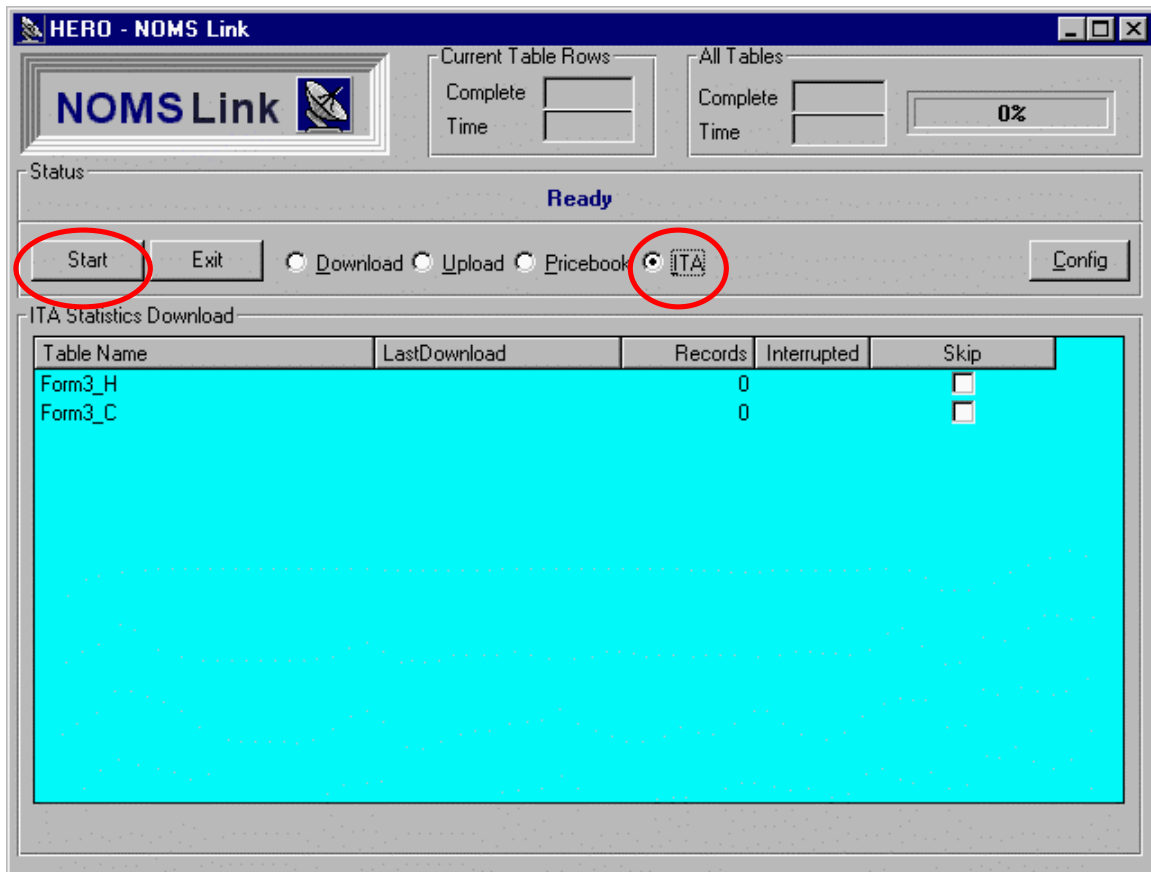
New Customer records need to be uploaded to push them out to the respective Host, Branch or Sales Rep laptop PC's for use in maintaining Customer Quotes.

Note: New items added to the Dealer Item Table must originate on the HERO Dealer Host PC.

DATA TRANSFER SUMMARY

<u>TABLE</u>	<u>HOST</u>	<u>BRANCH</u>	<u>LAPTOP</u>
New Customer (General Info)	Create Export to other levels	Create Export to other levels	Create Export to other levels
Subordinate Customer Info	Maintain No Export	Maintain No Export	Maintain No Export
Customer Quote	Create Export to other levels	Create Export to other levels	Create Export to other levels
Orders	Create Export to NOMS	No Access	No Access
SC Requests	Create Export to NOMS	Create (if auth). Export to NOMS	Create (If auth) Export to NOMS
Sped Quotes	Access Only	Access Only	Access Only
Dealer Items	Create Export to Branch and Laptops	Access Only	Access Only
Closure/Awareness MIDAS Reporting	Reporting	No Reporting	No Reporting

HERO ITA DOWNLOAD:



This download should be run once a month (Approximately third week of month) to receive the latest ITA data for use in MIDAS reporting.

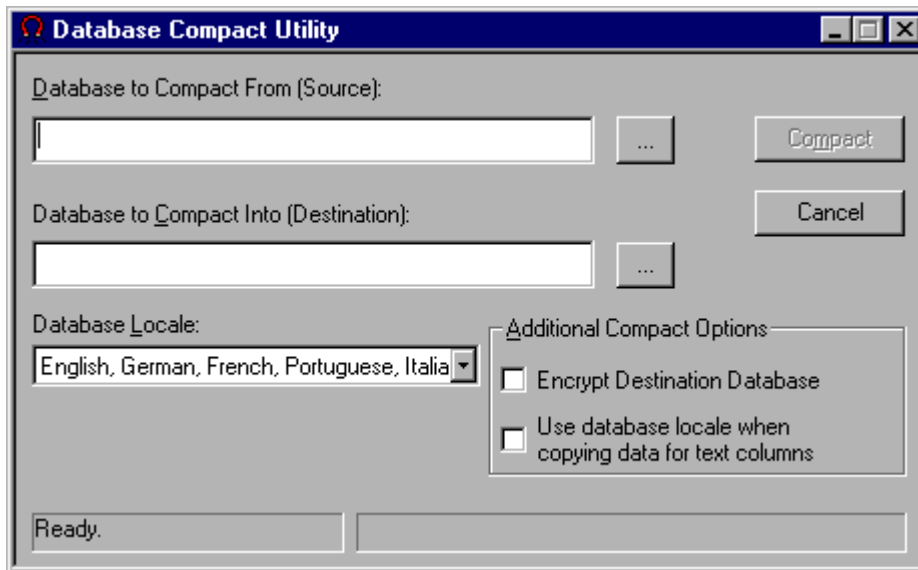
This will be a Host user function only.

EXTERNAL UTILITIES:

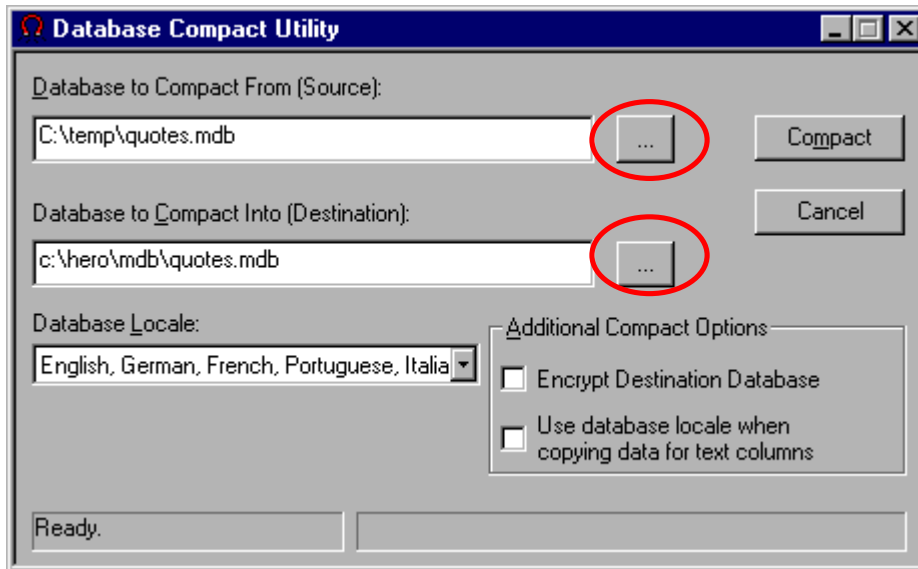
DATABASE COMPACT UTILITY:

Use this utility to compact and repair corrupted HERO databases **only** if HERO cannot be executed. Only HERO System Administrators and laptop users should run this utility.

- ⌚ Move the corrupted database from your HERO/MDB directory to a TEMP directory. If you do not have a TEMP directory, you should create one now. The database has to be moved, not copied.
- ⌚ Run the Database Compact Utility.



- ⌚ The first line is the entry for the source database. This is the database that is corrupted and that has been moved to the TEMP directory.
- ⌚ The second line is the entry for the destination database. The utility will create the compacted database in the directory specified, so it is very important that the correct directory and database names are used here.



- ⌚ The circled items are **browse** buttons. They are used to find the files that the utility will use. The browse button may be used with the source database, however, the destination database information should be entered manually.
- ⌚ Press the Compact button to begin the process. The utility status bar will report on the compacting process and will return to Ready status when complete.