

Unit Order Entry

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

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

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.

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

The 'Quote Type' section has 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 grid. At the bottom, there are controls 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.*

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.				

Hyster Electronic Retail Organizer

Adding the following default options for 02803 : AS CONTROLS

Option	Description	Price (each)	Qty	Dim	Std
04701	HOIST CONTROL-CONTACTOR	\$41,625.00	1		S
02402	FIELD WEAKENING-WITHOUT	\$0.00	1		S
02101	PARK BRAKE-MANUAL	\$0.00	1		S
08001	BATTERY INDICATOR				
05601	UL APPROVAL-E				

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

90 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 dropdown menu currently showing "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
Customer : A NEW CUSTOMER

Lease Calc Summary OK
Profit Print

SC Request #

	Dealer Cost	Customer Price	Extended Dealer Cost	Extended Cust Price
Breakout Factory Options	\$47,490.00	\$47,490.00	\$47,490.00	\$47,490.00
Factory SPED Items List			\$0.00	\$0.00
Factory List Disc to Cust				\$0.00
Factory List Profit to Dlr				
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			\$0.00	\$0.00
Local Delivery			\$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
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.

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

Quote Models **Customer Info** 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 field "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" for entering comment data.

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 Description

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

Context Menu:

- 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.

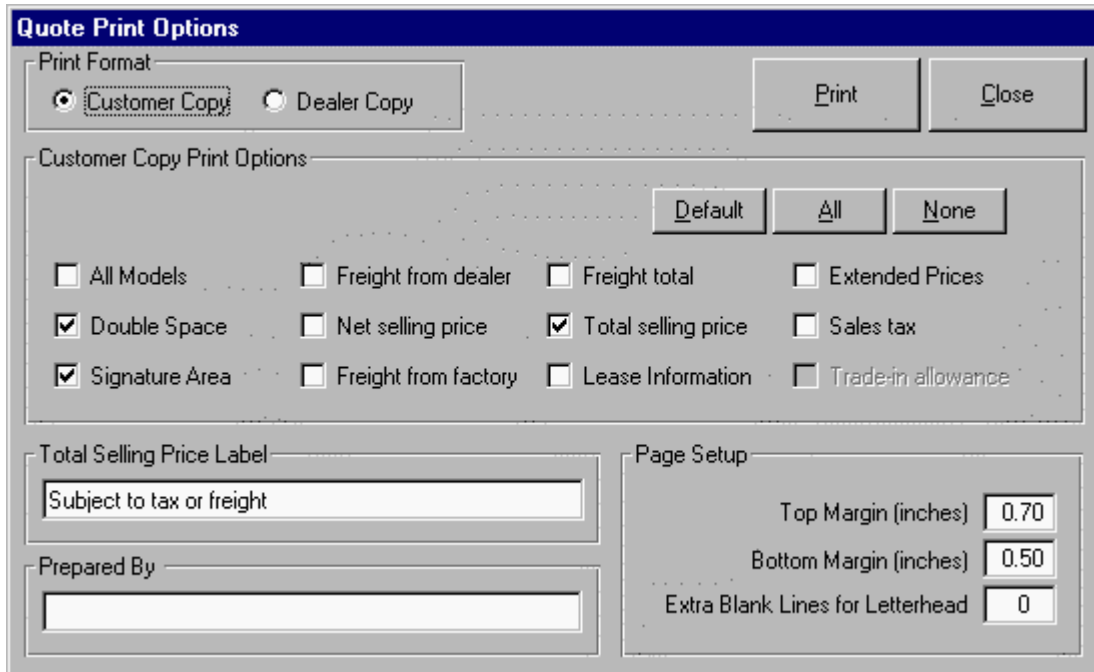
Xmit	Quote #	Customer	Cust City	St	Parent Co.	Eff Date	Exp Date	S
	F10002	A NEW CUSTOMER	OMAHA	NE		03/06/98	04/05/98	
	F10001	A NEW CUSTOMER	OMAHA	NE		03/06/98	04/05/98	
	F10000	A NEW CUSTOMER	OMAHA	NE		03/06/98	04/05/98	

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 software dialog box titled "Quote Print Options". It has a "Print Format" section with two radio buttons: "Customer Copy" (selected) and "Dealer Copy". To the right are "Print" and "Close" buttons. Below is the "Customer Copy Print Options" section, which includes three buttons: "Default", "All", and "None". There are eight checkboxes arranged in two columns: "All Models", "Double Space", "Signature Area", "Freight from dealer", "Net selling price", "Freight from factory", "Freight total", "Total selling price", "Extended Prices", "Sales tax", "Lease Information", and "Trade-in allowance". The "Double Space", "Signature Area", and "Total selling price" checkboxes are checked. At the bottom left, there is 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. At the bottom right is the "Page Setup" section with three input fields: "Top Margin (inches)" set to 0.70, "Bottom Margin (inches)" set to 0.50, and "Extra Blank Lines for Letterhead" set to 0.

Quote Print Options	
Print Format	
☒ Customer Copy	☐ Dealer Copy
Customer Copy Print Options	
Default All None	
☐ All Models	☐ Freight from dealer
☒ Double Space	☐ Net selling price
☒ Signature Area	☐ Freight from factory
☐ Freight total	☒ Total selling price
☐ Extended Prices	☐ Sales tax
☐ Lease Information	☐ Trade-in allowance
Total Selling Price Label	
Subject to tax or freight	
Prepared By	
Page Setup	
Top Margin (inches)	0.70
Bottom Margin (inches)	0.50
Extra Blank Lines for Letterhead	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.

QUOTE DETAILS BY MODEL:

Quote Details																											
Model	E35XM		Quote Qty	1		Status	Quote		Probability of Close	1 %	OK																
Close Date			Open	1		Condition	New		Price Date	03/06/98																	
Quote Amount	\$23,815.00		Won	0		Term	12		Interest Rate	0.00 %	Residual	\$0.00															
			Lost	0																							
			Dead	0																							
<table border="1"> <thead> <tr> <th>Won</th> <th>Qty</th> <th>Request #</th> <th>Hyster Order #</th> <th>Received Date</th> <th>Request Date</th> <th>Xmit</th> <th>Pend Chg</th> </tr> </thead> <tbody> <tr> <td colspan="8"> Order Details New Order </td> </tr> </tbody> </table>												Won	Qty	Request #	Hyster Order #	Received Date	Request Date	Xmit	Pend Chg	Order Details New Order							
Won	Qty	Request #	Hyster Order #	Received Date	Request Date	Xmit	Pend Chg																				
Order Details New Order																											
<table border="1"> <thead> <tr> <th>Lost</th> <th>Qty</th> <th>Date</th> <th>Competitor</th> <th>Model</th> <th>Price</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td colspan="7"> Print Lost Lost Details New Lost </td> </tr> </tbody> </table>												Lost	Qty	Date	Competitor	Model	Price	Type	Print Lost Lost Details New Lost								
Lost	Qty	Date	Competitor	Model	Price	Type																					
Print Lost Lost Details New Lost																											
<table border="1"> <thead> <tr> <th>Dead</th> <th>Qty</th> <th>Date</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td colspan="4"> * </td> </tr> </tbody> </table>												Dead	Qty	Date	Comments	*											
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.

QUOTE COPY FUNCTION:

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

From the QUOTE menu , select the COPY function.

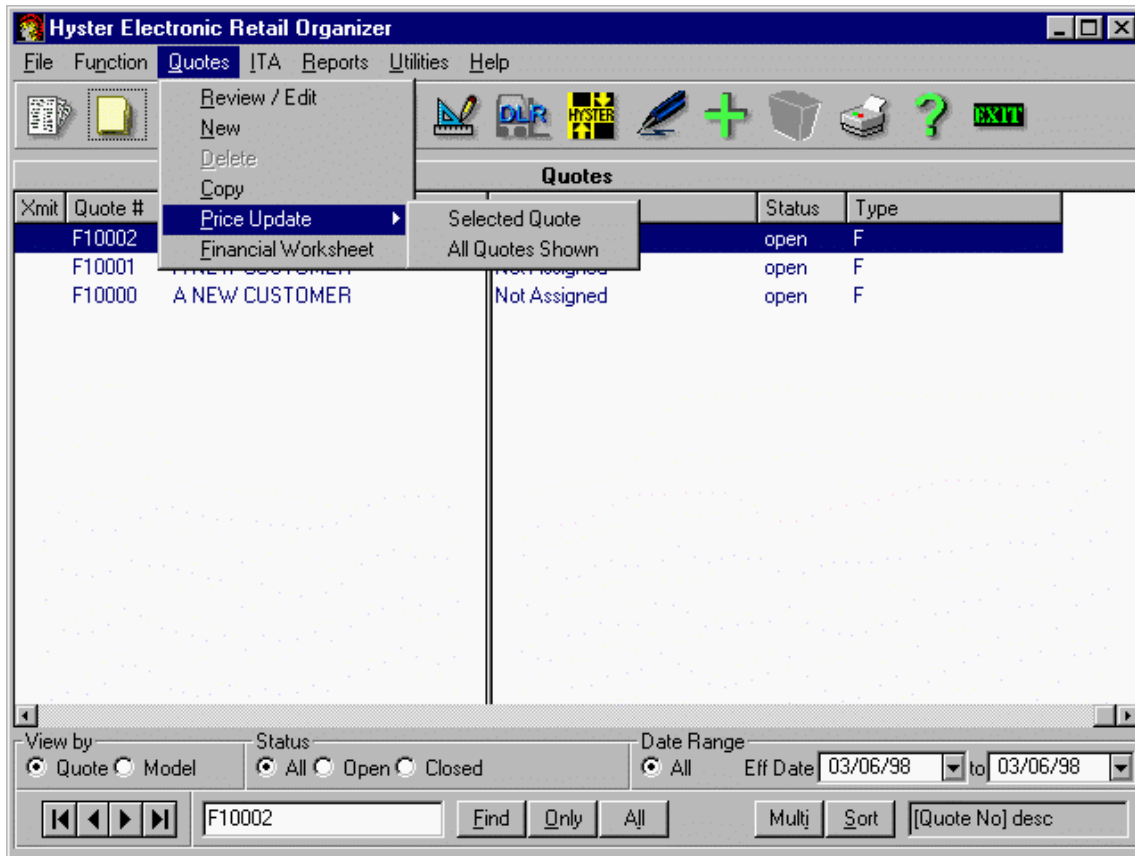
Xmit	Quote #	Customer	Cust City	St	Parent Co.	Eff Date	Exp Date	S
	F10002	A NEW CUSTOMER	OMAHA	NE		03/06/98	04/05/98	M
	F10001	A NEW CUSTOMER	OMAHA	NE		03/06/98	04/05/98	M
	F10000	A NEW CUSTOMER	OMAHA	NE		03/06/98	04/05/98	M

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
		Approval Date		Cancel Date		Pending
Customer				Parent		
Salesperson				Approval		
Requestor				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.

SC DISCOUNT COMMENTS:

Special Commitment Request

Request # 100001 Request Date Start Date Transmit Help OK
SC # Response Date End Date Approved U Print
Approval Date Cancel Date Pending

Customer A NEW CUSTOMER, OMAHA, NE USA Parent
Salesperson Not Assigned Approval Password Approve
Requestor

Details Competitor Information **Comments**

Comment	Date	Type
*		

A separate screen for additional comments has been provided.

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-.

Steps to assign a customer to the SC:

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

Quote Header

Quote # Transmit ☐ Type ☐ Use Dir Stock

Customer Parent Co.

Salesperson FOB Loc Terms Delivery Description

Create new E100XL2 order
Qty
Requested Delivery Date

Quote Models											
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:

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.

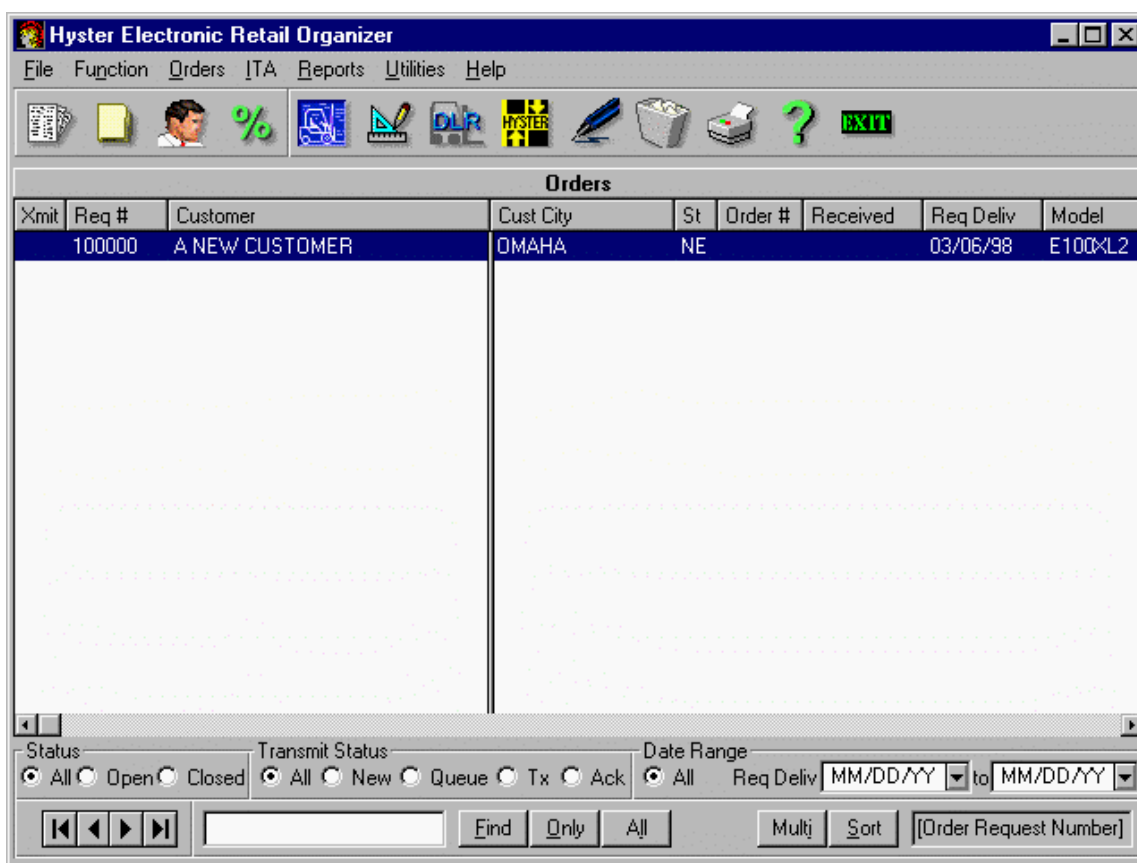
Reminder: The order process may ONLY commence from the HERO Host system.

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	05602		BATTERY		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:

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

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	☐	OK Help Milestones
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	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
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Select A NEW CUSTOMER Apply To

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 99999 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				
					Quote 1 Qty Changed				
Order Booked					Current 1				
Acknowledged					Original 1				
Cancel Date					Pending 0				
Override Comp N					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: 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
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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.

Trade-In Details:

Commission Detail:[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 <u>or</u> zero.	
Amount:	Enter an amount if <i>Based on</i> = A. Will be automatically calculated if <i>Based on</i> = 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

Navigation: [Previous] [Next] [Find] [Only] [All] [Multi] [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	Spnd 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.