

Submission of Dealer Quotes

Granting Access to the Fleet Portal

- Dealer access to the Portal is controlled using the designations assigned in D3, (users names and passwords) required for access to the Dealer Resource site.
- Dealer Principals or their D3 Administrator are responsible for the integrity of the security within their dealership location.
- Within the D3 setup screens there is a choice allowing access to the Hyster Fleet Management Portal, also referred to as WennSoft.
 - Branch access to be decided
 - Security group to be decided

Granting Access to the Fleet Portal

- Security groups are as follows:
 - DealerUpdate (Update)
 - Full access
 - Can update hour meter readings
 - Can create quotes
 - DealerView (View)
 - Full access
 - Can NOT update hour meter readings
 - Can NOT create quotes

D3 Security Setup

Yale Dealer Resource Site - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Print Mail

Address http://dealers.yale.com/security_administration/edit_user.asp Go Links

PC Service Tool Access

☐ None
☐ Diagnostic
☐ Service
☒ Programming

Fleet ☒

Update <-- [Select access type]

156500 - Northland Industrial Truck Company, Inc. - Wilmington, MA
156506 - Northland Industrial Truck Company, Inc. - Lewiston, ME
156507 - Northland Industrial Truck Company, Inc. - Shrewsbury, MA

<-- [hold down the Ctrl key to select multiple Dealer Codes]

DDS ☒

NOMS
NWO
PDC <-- [hold down the Ctrl key to select multiple systems]

156500 - Northland Industrial Truck Company, Inc. - Wilmington, MA
156506 - Northland Industrial Truck Company, Inc. - Lewiston, ME
156507 - Northland Industrial Truck Company, Inc. - Shrewsbury, MA

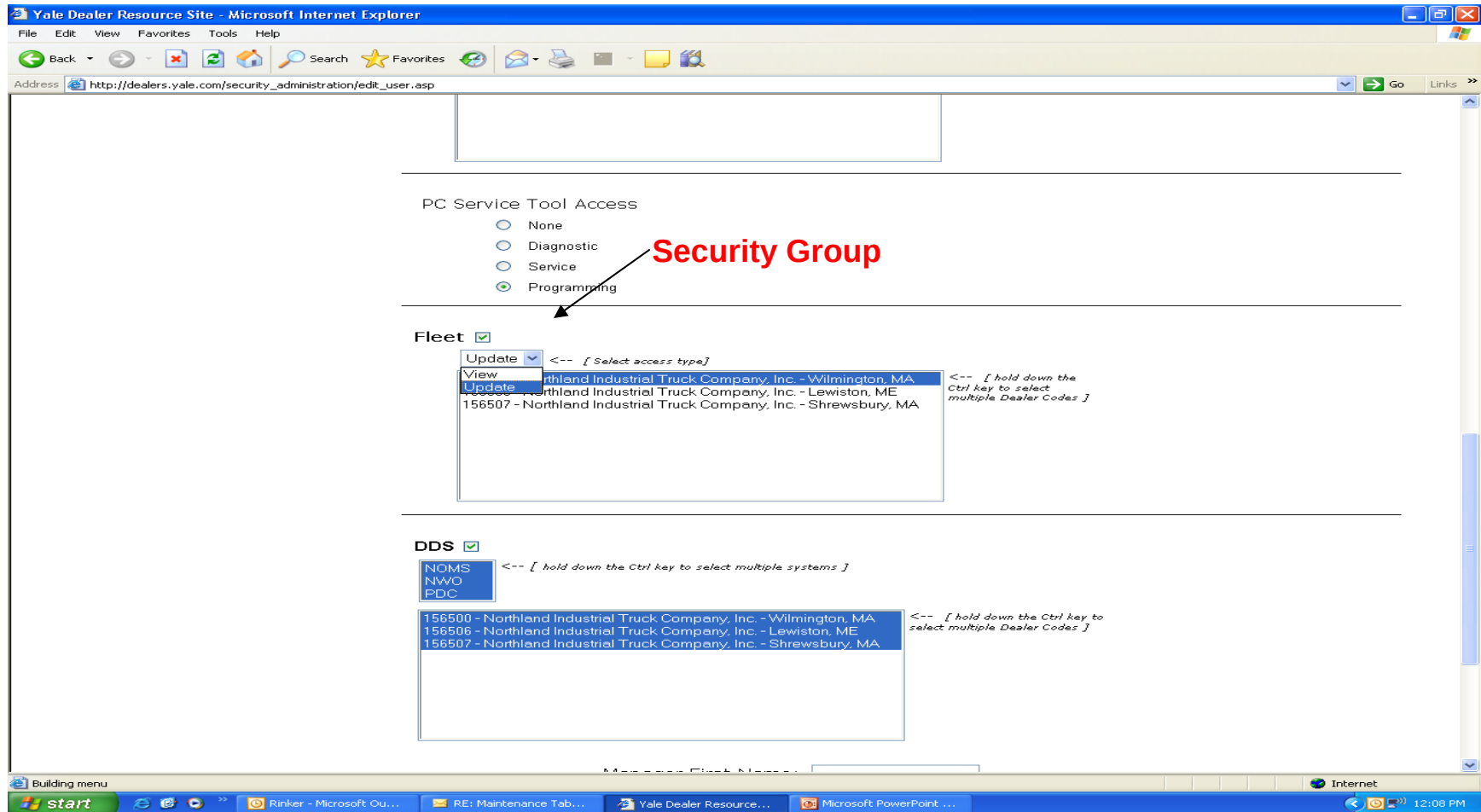
<-- [hold down the Ctrl key to select multiple Dealer Codes]

Message Field Name:

start Rinker - Microsoft Ou... RE: Maintenance Tab... Yale Dealer Resource... Microsoft PowerPoint ... Internet 12:08 PM

Dealer Bill to Codes /
Branches

D3 Security Setup



Hyster Digital Dealer - Windows Internet Explorer

http://www.hysterusa.com/DealerArea/fleetservices/wennsoftlaunch/default.asp#

Live Search

Hyster Digital Dealer

DIGITAL DEALER

ABOUT HYSTER HYSTER PRODUCTS DEALER LOOKUP UNISOURCE AFTERMARKET CONTACT HYSTER

Home Merchandise Catalog

You are logged on as: HAHFMETZ

Instant PASS
HYPASS
online

Truck Sales
Hyster Capital
Hyster Fleet
Parts
Service
National
Marketing
Dealer Systems
Training
Contacts
Accident
Log Off
Customer

Fleet Dealer Portal

[Launch Fleet Dealer Portal](#)

Log on via the Dealer Portal

FleetSmart Guidelines
FleetSmart Presentations
Fleet Contracts Administration
Professional Fleet Assessment
Fleet Dealer Portal
Master Rental Fleet
USG Partnership
Fleet PM Listings
Dealer Program Guidelines
Review Late Fees

Products // Dealer Lookup // Aftermarket // Contact Hyster // Home // Top 10 Reasons // Hyster Capital // Fleet
// Merchandise Catalog // Terms of Use // Privacy Policy // License Agreement

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U.S. Patent 6,684,148 and other patents pending.

HYSTER COMPANY
UL
190001-2000 A1245

Request PCST
Password(s)

Internet 100%

Fleet Portal - Service - Windows Internet Explorer

http://hysterfleet.com/default.aspx

Welcome fmetzger@mhequipment.com!

FleetSmart

FleetPortal

Emergency Logout

Service Equipment Quote Report

Customer: SMURFIT STONE

Status: ☒ Open

Location: Select a Location

Serial #:

Service Call Id:

Asset #:

Work Order #:

Generate Results

Page 0 of 0 (0)

No results were found for United Refrigeration, Inc.

Select the Appropriate Customer.

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Fleet Portal - Service - Windows Internet Explorer

http://hysterfleet.com/default.aspx

Welcome fmetzger@mhequipment.com!

FleetSmart

FleetPortal

Emergency Logout

Service Equipment Quote Report

Customer: **Wal-Mart Corpora** Location: Select a Location Serial #: Asset #:

Status: Open: ☒ Complete: ☐ Closed: ☐ Service Call Id: Work Order #: Generate Results

Page 1 of 1 (8 records)

Service Query Results

Service Call ID	Cust Name	Serial#	Asset#	Location	Call Status	Call Type	Problem	Work Order#	Vendor ID
100624-0223	Wal-Mart Corporate	5412		WAL MART 1812 - WOOSTER, OH	OPEN	Maintenance (B)	NEED MOTOR AND MOTOR BRUSHES		790000
100618-0001	Wal-Mart Corporate	5412		WAL MART 1812 - WOOSTER, OH	OPEN	Maintenance (B)	WILL NOT MOVE OR LIFT. STUCK		790000
100527-0012	Wal-Mart Corporate								
100512-0005	Wal-Mart Corporate	44277		Wal Mart 3253 - Edinboro, PA	OPEN	Maintenance (B)	UNIT IS LEAKING HYDRAULIC FLUI		790030
100504-0005	Wal-Mart Corporate	44277		Wal Mart 3253 - Edinboro, PA	OPEN	Maintenance (B)	UNIT HAS HYD LEAK		790030
100504-0018	Wal-Mart Corporate	66269		WAL MART 5445 - ERIE, PA	OPEN	Maintenance (B)	UNIT IS MAKING A HORRIBLE NOIS		790030
100318-0451	Wal-Mart Corporate	53211		WAL MART 2910 - SALEM, OH	OPEN	Maintenance (B)	RUBBER PIECE OVER TOP OF JOYST		790000
100129-0008	Wal-Mart Corporate	667603		WM2967	OPEN	Maintenance (B)	NOT HOLDING A CHARGE, SOMETHIN		790000

Quotes can be created on Open calls only. Click Generate Results to get a Call list.

Click Service Call ID to access the Call.

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Fleet Portal - Service Call Detail - Windows Internet Explorer

http://hysterfleet.com/servicecalldetail.aspx?scid=100624-0223

Service Summary for Service Call 100624-0223

Call Status: **OPEN** Call Created: **06/24/2010**
 Customer: **Wal-Mart Corporate** Location: **WAL MART 1812 - WOOSTER OH**

Serial #: **5412** Meter Reading: **0** Start Repair: End Repair:

Asset #: Call Type: **MNTB** Dealer Work Order:
 Customer PO: Call Type: **Maintenance (B)** Order:
 Problem type: Descr: Invoice #:
 Vendor ID: **790000** Call Origination: **VOICE MAIL** NMHG Claim#:
 Component Code:

Problem Description: **NEED MOTOR AND MOTOR BRUSHES**

Work Order Detail

Type	Part #	Description	Unit	Qty	Extended
Labor:					\$0.00
Parts:					\$0.00
Other:					\$0.00
Tax:					0.00
Total:					\$0.00

Service Notes

Subject	Author	Note
		NEED MOTOR AND MOTOR BRUSHES. SGB Your Service Call ID# MUST be included

Caller Name: **AMY DAVIS**
 Caller Phone: **(330) 345-8955 0000**
 Caller Email:

Paged:
 Dispatched:
 Arrived:
 Reassigned:
 Completed:

New Quote **Repair Status**

Click New Quote button.

All relevant info available in the Service Call Summary.

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Fleet Portal - Quote - Windows Internet Explorer

http://hysterfleet.com/quotedetail.aspx?scid=100624-0223

Quote Review #: 100624-0223

Customer: **Wal-Mart Corporate** Location: **WAL MART 1812 - WOOSTER, OH**

Quote Status: **Created Quote** Owner: **DEALER**

Save Delete Print

Serial #: **5412** Asset #: Service Date: **06-24-2010** Quote Result: **Field service request**

Meter Reading: **1500** Equipment Down: Yes: ☐ No: ☒ PO #: Dealer Contact: **TEST** Dealer Quote WO: **TEST**

Repair Notes: **Motor Brush Failure - Needs New bushing**

Quote Notes: **More than \$2250, requires quote.**

Add A Line Item:

Category: **Labor** Sub-Category: **Select a Sub-Category** Part #: Description:

Labor: **\$170.00**
Parts: **\$17.60**
Travel: **\$0.00**

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Add all pertinent information as well as a description of the repair.

Fleet Portal - Quote - Windows Internet Explorer

http://hysterfleet.com/quotedetail.aspx?scid=100624-0223

Live Search

Quote Review #: 100624-0223

Customer: **Wal-Mart Corporate** Location: **WAL MART 1812 - WOOSTER, OH**

Quote Status: **Dealer Submitted** Owner: **DEALER**

Save Delete Print

Serial #: **5412** Asset #:

Service Date: **06-24-2010** Quote Result: **Field service request**

Meter Reading: **1500** Equipment Down: Yes: ☐ No: ☒

PO #:

Dealer Contact: **TEST** Dealer Quote WO: **TEST**

Repair Notes: **Motor Brush Failure - Needs New bushing**

Quote Notes: **More than \$2250, requires quote.**

Add A Line Item:

Category: **Labor** Sub-Category: **Select a Sub-Category**

Part #: Description: **TUNE UP**

Hours/Qty: **4** X Cost: **85.00** = Ext Cost: **\$0.00**

Add each line item needed → **Add Line Item** **Cancel**

Labor: \$0.00
Parts: \$0.00
Travel: \$0.00
Drayage: \$0.00
Other: \$0.00
Total: \$0.00

There are no line items for this quote.

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Fleet Portal - Quote - Windows Internet Explorer

http://hysterfleet.com/quotedetail.aspx?scid=100624-0223

Quote Review #: 100624-0223

Customer: Wal-Mart Corporate Location: WAL MART 1812 - WOOSTER, OH

Quote Status: Created Quote Owner: DEALER

Serial #: 5412 Asset #:

Service Date: 06-24-2010 Quote Result: Field service request

Meter Reading: 1500 Equipment Down: Yes: No: ☒

PO #:

Dealer Contact: TEST Dealer Quote WO: TEST

Repair Notes: Motor Brush Failure - Needs New bushing

Quote Notes: More than \$2250, requires quote.

Update A Line Item:

Category: Parts Sub-Category: Select a Sub-Category

Part #: 2511076 Description: BUSHINGS

Hours/Qty: 1.00 X Cost: 17.60 = Ext Cost: \$17.60

Parts in the PDC Database will auto-populate price and description.

Save Line Item Cancel

Labor:	\$170.00
Parts:	\$17.60
Travel:	\$0.00
Drayage:	\$0.00
Other:	\$0.00
Total:	\$187.60

Fleet Portal - Quote - Windows Internet Explorer

http://hysterfleet.com/quotedetail.aspx?scid=100624-0223

Quote Review #: **100624-0223**

Customer: **Wal-Mart Corporate** Location: **WAL MART 1812 - WOOSTER, OH**

Quote Status: **Dealer Submitted**

Serial #: **5412**
 Service Date: **06-24-2010**
 Meter Reading: **1500**
 PO #:

Equipment Down: Yes: ☐ No: ☒

Dealer Contact: **TEST** Dealer Quote WO: **TEST**

Repair Notes: **Motor Brush Failure - Needs New bushing**

Quote Notes: **More than \$2250, requires quote.**

Save Delete Print

When Complete Change Quote Status to Dealer Submitted, then click the Save button.

Add A Line Item:

Category: **Labor** Sub-Category: **Select a Sub-Category**

Part #: Description:

Hours/Qty: **1.00** X Cost: **0.00** = Ext Cost: **\$0.00**

Line Items Added to Summary

Cost summary

Labor:	\$170.00
Parts:	\$17.60
Travel:	\$0.00
Drayage:	\$0.00
Other:	\$0.00
Total:	\$187.60

Summary

	Inventory Item	Part #	Description	Qty/Hours	Cost	Ext Cost	Category	Sub-Category
	no	2511076	BUSHINGS	1.00	\$17.60	\$17.60	Parts	
	no		REPLACE BUSHING	2.00	\$85.00	\$170.00	Labor	

Add Line Item Cancel

Fleet Portal - Quote - Windows Internet Explorer

http://hysterfleet.com/quote.aspx

Welcome fmetzger@mhequipment.com!

FleetSmart

FleetPortal

Emergency Logout

Service Equipment **Quote** Report

Customer: Select a Customer Location: Serial #: Status: Canceled by Fleet Created Quote Customer Approve Customer Decline Owner: Select an Owner Asset #: Quote ID: Generate Results

Page 1 of 1 (1 records) 1

Quote Query Results

Customer	Location	Serial#	Asset#	Quote ID	Quote Status	Owner	Service Date	Cust PO	Dealer Quote WO
Wal-Mart Corporate	WAL MART 1812 - WOOSTER, OH	5412		100624-0223	Created Quote	DEALER	06/24/2010		TEST

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Easy Access to Quotes and Updated Quote Status Via the Quote Tab....

Quote Statuses and Ownership

- The following are quote status items that a dealer may see and who has “ownership” of the quote (i.e. who can make changes to the quote at that time):

<u>Status</u>	<u>Ownership</u>
Created Quote	Dealer
Submitted Quote	Fleet
Returned to Dealer for Correction	Dealer
Returned to Dealer with Correction	Dealer
Resubmitted by Dealer (used if quote sent back to dealer and dealer resubmits)	Fleet
Submitted to Customer	Customer
Customer Declined	Fleet
Customer Approved	Fleet
Cancelled by Fleet	Fleet
Fleet Approved for the Customer (used if verbal approval given to fleet from customer)	Fleet
Fleet Approved for Billing to Fleet (used if customer will not pay but fleet agrees to)	Fleet
NMHG Reviewed to Claim (used when claim is received and matched to quote)	Fleet

Quote Emails--Difference from Service Call Emails

From: Wennsoft - Fleet System [mailto:wennsoft@nmhg.com]

Sent: Thursday, November 08, 2007 11:09 AM

To: bwesselman@barloworld.com; ccantlin@barloworld.com;
dboettcher@barloworld.com; dealers@yale.com; dowens@barloworld.com;
harrye@barloworld.com

Subject: Quote: 070813-0145, 1188, Estes Express, Inc., Hyster Fleet

Customer Name: Estes Express, Inc.
Address ID: 1188
Location Name: 1188 Laurel, MD
Address 1: 14300 BALTIMORE AVENUE
City: LAUREL
State: MD
Zip: 20707
Phone 1: (301) 498-3466
Equip Serial Number: B875B19050Z
Equip 1st Asset: F17535
Equip Manufacturer: HYSTER
Quote ID: 070813-0145
Customer P.O. Number: 99218
Quote Status: Customer Approved

Note difference in subject line and detail of email for Quotes.

When a Quote Status of "Customer Approved" is received, repair can be completed.

Also, a Quote Status of "Fleet Approved for the Customer" or "Fleet Approved for Billing to Fleet" is approval to complete the repair.