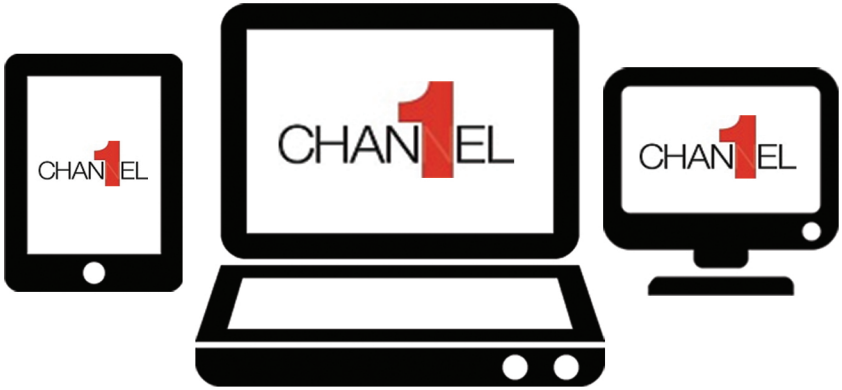
CHANNEL 1

Cummins Power Generation

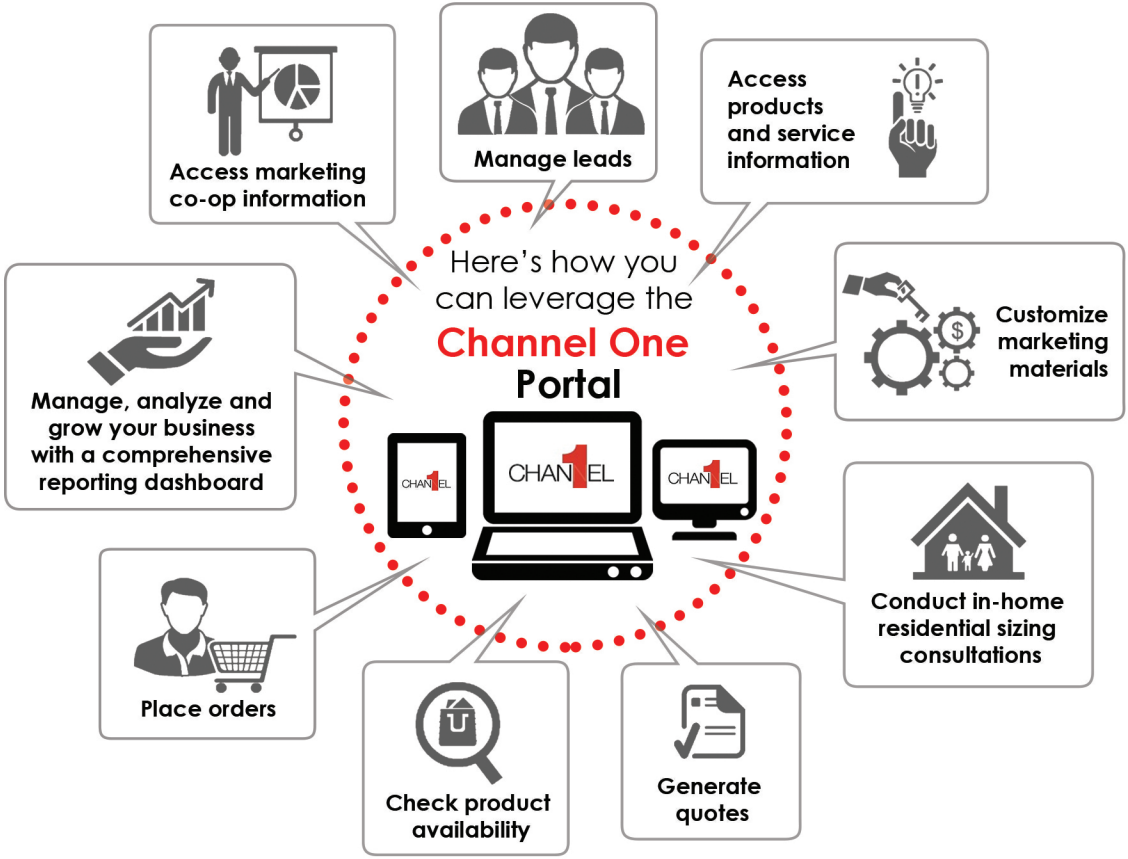
Channel One Portal

Quick Reference Guide



Channel One Portal

Quick Reference Guide: Dealer



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1

Getting Started

Getting Started

Site Navigation

Purpose: In this Quick Reference Guide, you will learn how to navigate through the Channel One Portal.

1. Enter the URL *https://channelone.cummins.com* and the Channel One Portal Login Page appears.

2. Enter your **Username** and **Password** – the Channel OnePortal homepage appears.

   Note: The news carousel is present at the top of the page and contains banners of important news related to product, pricing announcements, and marketing campaigns. You can get more information about these news by clicking Read More.

3. Select Profile from the *My Account* drop-down list – your profile page appears.

4. Click SITE HELP - a drop-down list appears with links to *FAQs* and *Request Help*.

   Note: You will also find a *Getting Started* link which will give you brief tips on how to use the portal.

5. Click OTHER CUMMINS SITES - a list of links to other sites appears.

6. Click Manage My Dealership - the *Manage My Dealership* page appears.

   Note: On this page, you can view and download information that pertains to your dealership.

7. Click Product Information - links to view technical documents and sales materials appears.

8. Click Sales to access sales related functionalities such as the Gen Sizing Tool, Leads, Quotes and Orders, Pricing and Sales Reports.

9. Click Training to view your team's training/certification details and available Channel One Portal training resources.

10. Click Marketing to access marketing materials and the co-op budget page.

    Note: The *Co-Op Budget* link will be available only to a **Dealer Admin** user.

11. Click CHANNEL to navigate back to the Channel One Portal homepage.

12. The *Factory and Distributor News* and *Distributor Contacts* links will be available on the left panel on the homepage.

13. You will find quick access links to the GenSizing tool on the right-hand panel on the homepage.

14. Below the content area, you will see links to *All News*, *News Archive*, *FAQ*, *Getting Started*, *Contact Listing*, and *Submit Feedback*.

15. You will also find the links to the *Privacy Policy*, *Terms and Conditions*, and *Site Map* at the bottom of the page.

2

Lead Management

Lead Management

Create and Work on a Lead

Purpose: In this Quick Reference Guide, you will be able to create a lead, add activities, and add contacts for a lead in the Channel One Portal.

1. Click Sales - the *Sales* drop-down list appears.
2. Click Leads, Quotes and Orders - the *Leads, Quotes and Orders* page appears. .
3. Click Manage Leads > - the *Leads List* appears.

   Note: By default, you can see the **My Leads** view. This view only displays existing factory and distributor sourced leads allocated to your dealership. If you are a Supervisor or a Dealer Principal, you can view both **My Leads** and **My Team's Leads** via the drop-down list. If you are a sales representative, only the **My Leads** view will be available.
4. Click Create a New Lead - a new row appears.
5. Enter the required details in the given fields.

   Note: The mandatory fields are:

   i. **First Name**

   ii. **Last Name**

   iii. Either **Primary Phone** # (no.) or **Email**

   iv. **Dealer** name (Auto-populated)

   v. **Assigned To**

   Vi. **Distributor** name (Auto-populated)

   The **Status, Dealer, Assigned To**, and **Distributor** fields are auto-populated. You cannot enter or modify the **Dealer** and **Distributor** fields. However, you can update the status of the lead by selecting the appropriate item from the **Status** drop-down list. If required, you may also change the **Assigned To** details using their respective search icons.

   The **Reason** field is mandatory if the status is updated to **Lost**.
6. Click the **Last Name** hyperlink of the respective lead – the *Lead Information* section appears.

   Note: You can update the required fields. **Company Name** is mandatory if the **Market** field is updated to **Small Business**. **City**, **State**, **Country**, and **Zipcode** fields are mandatory if the **Address Line** is updated. You can add or remove lead assignees by clicking the respective **Assigned To** search icon. For more details on assigning leads, view the quick reference guide for **Assign Leads**. You may insert any comments in the **Comments** field.
7. Select the appropriate status from the **Status** drop-down list.

   Note: You can manually update the status after completing each of the tasks listed in the drop-down. Executing certain activities in the portal such as scheduling and completing a consultation using the activities function will automatically update the lead status.
8. Click - additional fields appear in the *Lead Information* section.

Lead Management

9. **Note**: Below the lead's detail information section, you'll notice various subtabs.

   Contacts | Activities | Quotes | Email Communication

10. Click Activities - the *Activities* subtab opens.

    Note: The list under the *Activities* subtab keeps track of your activities such as phone calls, Emails, and in-home consultations. All tasks related to lead conversion can be logged and tracked in the *Activities* section.

11. Click New - a new row appears.
12. Click ▾ in the **Type** field - the **Type** drop-down list appears.
13. Click ▾ in the **Status** field - the **Status** drop-down list appears.
14. **Note**: The system also enables you to add multiple contacts under a single lead to help manage your light commercial and small business customers. You can add additional contact details for a small business lead and select a primary contact from the available list.
15. Click Contacts - the *Contacts* subtab opens.
16. Click New - a new row appears.
17. Enter the required details in the given fields.
18. Click - the *Address* dialog box appears.
19. Click New.
20. Enter the required details in the given fields.

    Note: By default, the **Primary** checkbox is selected for the first entry in the contact details and the address fields. If you do not want a contact detail to be the primary contact, clear the **Primary** checkbox. Note that you can clear the checkbox only if you have multiple contacts for the same lead. Every lead requires a primary contact.

21. Click OK - you have successfully created and updated contact details.
22. **Note**: A lead is considered closed if the status is updated to **Won**, **Lost**, **Cancelled**, or **Expired**. You can either manually update the status, or auto-update it via completion of **Activities**. If the status is updated to **Lost** or **Cancelled**, updating the **Reason** field is mandatory.

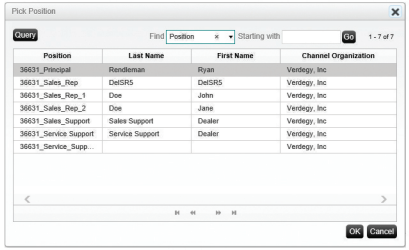
Lead Management

Assign a Lead

Purpose: In this Quick Reference Guide, you will learn how to assign a lead to a sales representative within your dealership and take a lead from one representative and assign it to another.

1. Click Sales - the *Sales* drop-down list appears.
2. Click Leads, Quotes and Orders - the *Leads, Quotes and Orders* page appears.
3. Click Manage Leads > - the *Leads List* appears.

   Note: By default, you can see the **My Leads** view. This view only displays existing factory and distributor sourced leads allocated to your dealers. If you are a Dealer Principle, you can view both **My Leads** and **My Team's Leads** via the drop-down list. By default leads are initially assigned to the dealer principle or sales lead. Leads can be reassigned.
4. Select the lead that you would like to assign.
5. Click Assign Leads - the *Pick Position* dialog box appears.



6. Select the sales team member(s) you would like to assign to the lead.
7. Click OK - you have successfully assigned a lead to your sales representative(s).
8. Click the **Assigned To** field for a lead to remove an assignee.
9. Click - a dialog box appears.
10. Click an assignee's name to remove the assignee.
11. Click < Remove .

    Note: You can click << Remove All to remove all assignees at one click.
12. Click OK.
13. **Note**: If a lead is reassigned to a different sales representative, the lead will disappear from the **My Leads** list. However, if you are a Dealer Principal or Supervisor, you can still view the lead from the **My Team's Leads** view.
14. **Note**: You can also assign a lead to a sales representative from the **Assigned To** field on the lead information section. To learn more about the lead information page, refer to the quick reference guide on **Create and Work on a Lead**.

Lead Management

Lead Sizing

Purpose: In this Quick Reference Guide you will learn how to utilize the sizing tool for a lead, create a sizing report, and attach it to a quote.

1. You can execute Genset sizing for a lead using the Sizing tool. There are several ways to launch the Sizing tool from the Channel One Portal. If you wish to utilize the sizing tool for an existing lead in the system and want to store the sizing report on the customer account and/or add the sizing report to a quote proposal, you can launch the Sizing tool while creating a quote for a lead in the Sales application.
2. Click Sales - the *Sales* drop-down list appears.
3. Click Leads, Quotes and Orders - the *Leads, Quotes and Orders* page appears.
4. Click Manage Leads > - the *Leads* list appears on your left.

   Note: You can scroll down to view the complete list.
5. Click the first name of the respective lead – the lead is selected.
6. Click Size & Quote - a new quote is generated for the lead.
7. Click Size a Generator - the *Customer* section on the *Estimate Generator Needs* page appears.

   Note: Since you have accessed the Sizing tool via the **Leads** list, the **First Name**, **Last Name**, **Email**, and **Address** fields are populated as per the values entered in the *Leads* list.
8. Enter all mandatory fields in the *Customer* section.
9. Click Next - the *Location* section appears.

   Note: The fields in this section are not mandatory. However, details entered in these fields help the Genset Sizing tool to estimate more effectively.
10. Click Next - the *Appliances/Coverage Needs* section appears.

    Note: This is the page where the wattage requirement for a lead is calculated. The red box at the top right, titled *Power Load*, shows the total kW based on the values entered by you in the fields below.
11. Click the required accordions – the appliances under each category appear.
12. Click + to add quantity.

    Note: Once you specify the quantity, the **Watts** field is auto-populated. The Sizing tool auto-calculates the standard wattage of each appliance. You may wish to overwrite the wattage if you have more precise information.
13. Click + on the left of **Add Another Item** field to add more appliances.
14. Click Next the *Review Summary* section appears.

    Note: Here, you can review the details captured in the previous sections. You may still modify the values by clicking the *Edit Appliance* link.

Lead Management

15. Click Next - the *Recommendation* section appears.

    Note: The Sizing tool recommends three options that are the best fit for the customer, based on the details provided in the previous section. These options are either equal to or greater than the required power load for the lead. You can also view the product image and description from the *Recommended Options* list.

16. Select the **Include in Sizing Report** checkbox to include a specific product(s) in the sizing report.

17. Click Save & Attach to quote a confirmation message stating that the sizing report is attached to the quote.

    Note: Once your quote is created, you may send the quote and the sizing report to the customer in a single email.

18. Click OK .

19. **Note**: You may also click Email PDF to generate a recommendation email. After clicking Email PDF , you will see *Email Recommendation PDF* dialog box. Once you draft the email on the dialog box, click Send to dispatch the email.

20. Click ✕ to close the Sizing tool tab. You will see the *Quote Detail* section once again.

    Note: Based on the sizing report you can now add products and create a quote. For more details on creating a quote, please refer to the Quick Reference Guide on **Work on a Quote**.

21. Click Step 6: Attach Documents & Email to view the sizing report.

    Note: The sizing report appears in the *Attachments* section.

22. **Note**: If you want to launch the tool directly from the Channel One Portal homepage, click the link under the *Estimate Power Generator Needs* section. This will allow you to quickly launch a standalone sizing report. You will be required to enter customer contact information. You will have the opportunity to email the sizing report to your customer or save the sizing report to your local desktop. However, sizing reports generated in this manner will not be tied to a customer record in the system.

    You can also launch a standalone sizing report by clicking Launch Tool from the *GenSizing Tool* page. You will be able to navigate to the *GenSizing Tool* page from the *Sales* drop-down list.

3

Quoting

Quoting

Create a Quote

Purpose: In this Quick Reference Guide you will learn about the features present in the Channel One Portal that enable dealers to create and modify customer quotes.

1. Click Sales the *Sales* drop-down list appears.
2. To create a quote leads from the Channel One Portal homepage, from the **Sales** drop-down list, select **Leads, Quotes and Orders.** Leads, Quotes and Orders
3. To navigate to the leads list, click the **Manage Leads >** link. Manage Leads >
4. You can now view the **Leads List** section, under the **Accounts/Leads** tab. The list displays information on the lead's **First Name, Last Name, Primary Phone #** (no.), **Email, Status,** and **Reason**. It also displays the **Lead Age, Market, Dealer, Assigned To, Home #** (no.), **Mobile #** (no.), **Main Fax #** (no.), and **Distributor Name** fields.
5. To select the required lead, click the lead name.
6. To generate a quote for the lead, click **Size & Quote**. Size & Quote
7. Clicking **Size & Quote** starts the quote creation process.
8. In case there is no quote here, you can create a new quote on this page.
9. The fields in the quote **List** are auto-populated. Any previous quotes provided to the lead are also stored in the quote list.
   You can now add products to the quote by utilizing the product catalog.
10. To add products to the quote using the product catalog, click either the quote name or the quote number.

    For this training, we will click the quote name.

    1-1BRB8R Paul Newman
11. You are now viewing the product catalog. The product catalog contains Cummins Power Generation (CPG) products as well as distributor or dealer specific products and services. The product catalog is utilized to build customer quotes and place dealer orders. As you enter the product catalog, you are shown the **Step 1: Select Product** subtab, as the default view.
12. By default, a list of available gensets are displayed. You may click the other categories available on the left panel to view, sort, and select products under those categories. RS20AC (Canada)-20kW-NG/LPV-Aluminum Enclosure-120/240 V
13. To view product details, within the catalog, click the product name link in blue.
14. This opens a product details screen with a high level product description.
15. To view full technical product information on the product, on the product details page, click the SpecSheet **SpecSheet** link (also in blue).
16. You can now view the technical specification sheet.
17. To specify the product quantity, in the **Quantity** field, you may enter the required number.
18. To add the product to the quote, click **Add Item.** Add Item
19. The product is added to the **Quote Product List** on the right.

Quoting

20. If you do not want to view the technical specifications of a product, and want to quickly add the product to the quote list, you can click the image of a product to select it.

21. To specify the quantity of the product, you need to enter the required number in the **Quantity** field.

22. To check if the product is available in either the distributor or factory inventory, click **Check Inventory**.

    Check Inventory

23. Once you click **Check Inventory**, a popup appears to inform you whether or not the product is available at the distributor's inventory. If the product is available at the distributor, estimated delivery time is provided. If the inventory is not available at the distributor, factory inventory is checked. If the product is available at the factory, estimated delivery time is provided. If inventory is not available at the factory as well, estimated lead time and delivery time are provided.

24. To add the item to the quote, click **Add Item.** Add Item

25. Once you have added your genset to the quote, you have two options to order additional products. You can use the product tree on the left to identify and add independent products to the quote. The Channel One Portal also provides a quoting/ordering wizard for comprehensive quoting/ordering solutions. To utilize the wizard, add a genset in step one and then follow steps 1-6.

26. To add compatible ATS for the selected gensets, click the **Step 2: Add Compatible ATS** subtab. Step 2: Add Compatible ATS

27. To view the ATS compatible for a genset, you need to click the genset on the **Quote Product List.**

    The Compatible ATS list gets updated based on the selection.

28. If you want to add an ATS to the **Quote Product List**, you can click the ATS **Product** field.

29. To add an item to the quote list, click **Add Selected Item.** Add Selected Item

30. The ATS you have selected is now added to the **Quote Product List.**

31. To view the list of compatible accessories, click the **Step 3: Add Accessories** subtab. Step 3: Add Compatible Accessories

32. This subtab will present you with a list of accessories that are compatible with the genset highlighted in the **Quote Product List**.

33. Following a procedure similar to adding a compatible ATS, you can now add compatible accessories.

34. To view the list of dealer and distributor products, click the **Step 4: Add Dealer/Distributor Products** subtab. Step 4: Add Dealer/Distributor Products

35. Following a procedure similar to adding an ATS or accessory, you can now add dealer and distributor products. However, note that there is no compatibility check for the dealer and distributor's products. These products are not manufactured or supplied by CPG. An example of a dealer/distributor product is the dealer installation services.

Quoting

36. If you want to remove a product from the **Quote Product List**, you can select the product you wish to delete and click **Remove**.

37. To view and modify the details of a proposed quote, click the **Step 5: View Proposal** subtab. Step 5: View Proposal

38. In this section, you can adjust prices, change statuses, and generate a quote for the customer.

39. The fields which are auto-populated are **Quote Name, Quote#, Lead, Dealer, Price List, Currency,** and the **Quote Total**.

    The fields which can be modified are **Sales Rep, Status, Reason Code, Effective Through, Discount, Show Itemized Price,** and **Comments.**

    You can also view the quantity, unit price, and final price of each product included in the quote proposal.

40. Product catalog pricing is set up beforehand. However, there can be instances when you want to modify your pricing on the fly for one particular customer. There are three ways to adjust prices on the fly:

    i) Set a discount on all products in the proposed quote.

    ii) Set a discount on individual products in the proposed quote.

    iii) Override prices of individual products in the proposed quote.

41. If you want to set a discount on all products in the proposed quote, in the **Quote** section, you need to set the desired discount value.

42. You can observe that the final price of all the products has changed as per the discount value entered.

43. To set a discount against an individual product, enter a value in its respective **Discount** field.

44. You can observe that the final price of that particular product has changed as per the discount value entered.

45. If you want to override the price of a product, you can enter the desired price in the respective **Price Override** field.

46. You can observe that the final price of that particular product has changed as per the value entered in the **Price Override** field.

47. To specify a time period till which the proposal will be valid, enter a date in the respective **Effective Through** field.

48. To ensure the price of each product is displayed on the proposal, select the **Show Itemized Price** checkbox.

    Note: If you wish to provide your customer with a summary quote masking line item pricing, do not select the **Show Itemized Price** checkbox.

49. To generate the quote, click **Generate Proposal**. Generate Proposal

50. You can now see a success message.

51. You can notice that the status of the proposal has been changed to **Proposal Generated**.

    Using the **Status** drop-down, you can later change the status of the quote to a desired value.

Quoting

52. To view the generated proposal, click the **Step 6: Attach Documents & Email** subtab. Step 6: Attach Documents & Email

53. The proposal is available as a hyperlink in the **Attachments** section. Click it. WL Paul Newman Proposal 31102014 032058

54. A PDF appears with all the proposal details. This quote is ready to be shared.

55. To send the quote with the email, select the respective **Select File** checkbox.

    This is also where you would attach the sizing report and any site pictures.

56. To add a marketing brochure to an email, in the Marketing Material section, click **New**. New

57. You can now see the list of available marketing materials.

58. To identify the required marketing materials, select them from the list.

    For this training, we will select the item in the topmost row.

59. To add the selected items, click **Add**. Add

60. To ensure that the marketing materials are sent along with the email, select the respective **Select File** checkbox.

61. You may add or edit recipient IDs subject line, mail body, and comments as required.

62. To send the email to the desired recipient, click **Send Email**. You will notice that the leads email will default into the **"To"** column. Our recommendation is that you replace this email address with your own, email the documents to yourself and then use your email to forward the proposal and supporting documents to the customer.This is necessary as the system generated emails will come from a generic email address and customers will not be able to respond to respond to the generic email. Send Email

63. A confirmation message is displayed. This indicates that the email has been sent and your task is complete.

4

Ordering

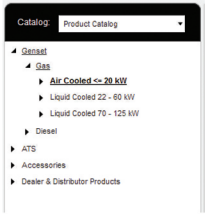
Ordering

Place an Order

Purpose: In this Quick Reference Guide, you will learn how to check inventories, view product catalogs, order Genset Compatible Automatic Transfer Switches and generate order summaries. You will also be briefed on how the portal utilizes email notifications.

1. Tap **Sales** - the *Sales* drop-down list appears.
2. Click **Leads, Quotes and Orders** - the *Leads, Quotes and Orders* page appears.
3. Click Place, View and Track Orders > - the *Orders* tab opens.
4. Click **Place an Order** - a new order is added with an auto-generatedorder number.
5. Click the newly generated order number hyperlink - the *Step 1: Shop Products* subtab appears.

   Note: The order number hyperlink looks like: 1-79749651 .
6. **Note**: By default, you can see a list of available gensets. You may click the other categories available in the *Catalog* on the left panel to view and select products under those categories.



7. Click the required product panel - the product is selected.
8. Click **Check Inventory** - a confirmation message appears.

   Note: If the product is available in distributor inventory, a confirmation message will appear and the system will provide you with an estimate of the number of days required to ship the product. If the product is not available in distributor inventory, the system will then check factory inventory. If the product is available in factory inventory, the system will provide you with an estimate of the number of days required to ship the product. If the product is not available with the distributor or the factory, the dealer portal will provide lead time and shipping time estimates.
9. Click **OK** .

   Note: If you wish to add the product directly, you may enter the required quantity in the **Quantity** field and click **Add Item** .
10. If you wish to review technical specifications before you order, click the hyperlink on the product name – the product details section appears.

    Note: From the detailed product information screen you have the opportunity to open the spec sheet for the Genset or ATS product that you currently have selected.
11. Click **Spec Sheet** the specification sheet appears as a PDF.
12. Enter the required number in Quantity: .
13. Click **Add Item** - the product is added to the *Order Cart* on your right.

    Note: If required, you may remove a product from the cart by clicking **Remove**.

Ordering

14. Click Step 2: Add Compatible ATS - a list of compatible ATS appears.

    Note: This list only contains ATS that are compatible with the genset that has been highlighted/selected in the order cart.

15. Click Add Selected Item - the ATS appears in the *Order Cart*.

16. Click Step 3: Add Compatible Accessories list of compatible accessories appears.

    Note: This list only contains accessories that are compatible with the genset that has been highlighted/selected in the order cart.

17. Click Add Selected Item

18. Click Step 4: Add Distributor Products a list of distributor specific products appears.

19. Click Add Selected Item.

20. Click Step 5: View Order and Checkout - the order details section appears.

    Note: Here you can review your order.

21. Click Submit Order - a confirmation message appears.

    Note: If your dealer profile is configured to receive order status email notifications, your dealer will receive a system generated email notification confirming the order submission.

22. Click OK - the order is placed successfully.

23. Click to generate a report summary - the *Run Report* dialog box appears.

    Note: Here, you can add a customized name to the report, choose an output type, and identify the report locale from the respective fields.

24. Click Submit.

25. Click My Reports .

    Note: The report summary you generated and renamed just now will appear in the list of report names.

26. Click the required report hyperlink – the order summary report opens in the chosen format.

5

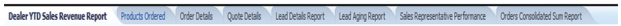
Reports

Reports

Dashboard Reports

Purpose: In this Quick Reference Guide, you will learn how to access various reports in the Channel One Portal.

1. Tap **Sales** - the *Sales* drop-down list appears.
2. Click **Leads, Quotes and Orders** - the *Leads, Quotes and Orders* page appears.
3. Click either Manage Leads > or Place, View and Track Orders > - the Sales application opens.
4. Click **My Dashboard** - various reports appear as subtabs.

   Note: You can click any of the subtabs to view the report.
5. **Note**: You can roll your mouse cursor over the graph to view additional details.
6. Click Graph and select an appropriate option from the drop-down list.

   Note: Every report in the Sales application allows you to choose from the two available interfaces: graph and table.
7. Click to print the report – the *Menu* drop-down list appears.
8. Roll your mouse cursor on Print - two options are displayed Printable PDF / Printable HTML.

   Note: You can select the appropriate option.
9. A printable report opens in a different tab. You can click My Dashboard to view the *Reports* section again.
10. Click to export the report to MS Excel.
11. Roll your mouse cursor on Export to Excel - two options are displayed Export Current Page / Export Entire Dashboard.

    Note: You can select the appropriate option.
12. Click OK - the excel sheet is saved.
13. Click to change the parameters for a report.

    Note: Depending on the type of the report, the parameters will change.
14. Click Apply - the report data changes as per your input.

6

Dealer Set Up

Dealer Setup

Profile Management

Purpose: In this Quick Reference Guide, you will learn how to manage your profile.

1. Click Sales - the *Sales* drop-down list appears.
2. Click Leads, Quotes and Orders - the *Leads, Quotes and Orders* page appears.
3. Click Manage Leads > - the Sales application opens.
4. Click Profiles - the *My Profiles* page opens.
5. **Note**: If you want to add your dealer logo to the customer facing quotes you will create in the portal, you need to provide a logo attachment in the attachment section of your profile. The file type must be assigned as logo. You may only attach one dealer logo at a time. The logo image file should conform to following standards – it is required that the logo height be less than 100p, width standards are for guidance only:

   a. File Size should be less than 1MB

   b. Format - jpg, png, gif, bmp

   c. Dimensions (in pixels):

      i. Square Logo – 100p x 100p

      ii. Rectangle Logo – 150p x 100p

6. Enter the details in the necessary fields.
7. **Note**: In *My Profile*, you can view your primary *Sales Team*. You may click in the **Sales Team** field to view the other available sales teams. However, this field is non-editable.
8. **Note**: Your primary address will be displayed in the **Address** field by default. This is the address your distributor has entered into the World Wide Service Provider System.
9. Select **Lead Email Notification** checkbox to receive email notifications when new leads are available.
10. Enter the email ID in the **Lead Email Notification** field to specify an email address where you want to receive the lead email notification.

    Note: Only one lead notification field is available per dealer. This should be the principal or lead sales role who has the ability to re-assign leads within the dealership as they are received. You also have the option to add multiple email addresses in this field to copy multiple team members on notices. Simply enter multiple email addresses separated by a ";".
11. Select the **Order Email Notification** checkbox to receive email notification for order status changes.

    Note: The automatic order email notifications will be sent to the email address tied to your dealer profile—not the lead notification email address.

12. Specify your preferred options in the **Preferred Shipping Method** field. Compliance with this request is at the discretion of your distributor.

    Note: The **Shipping Time** field denotes the time required for the distributor to ship items to your dealership location. Therefore, this field is not editable. Your distributor updates this field.

13. Specify your preferred options in the **Preferred Shipping Carrier** field. Compliance with this request is at the discretion of your distributor.

14. The **Quote Disclaimer** field allows you to add disclaimers regarding tax, shipping, permitting policies and regulations. When you generate a quote for a lead, the text in the **Quote Disclaimer** field gets added to your proposal and is eventually sent to the customer.

15. Click Terms & Conditions - the *Terms & Conditions* subtab appears.

    Note: A dealer can upload and use only one terms and conditions document.

16. Click New.

    Note: If you have already created a terms and conditions document, you can view it in the list. You have to click Delete to remove the existing document and add a new one.

17. Enter your terms and conditions in the **Description** field.

Dealer Setup

Product Management

Purpose: In this Quick Reference Guide, you will learn how to manage and add products to the Channel One Portal.

1. Click Sales - the *Sales* drop-down list appears.
2. Click Leads, Quotes and Orders - the *Leads, Quotes and Orders* page appears.
3. Click either Manage Leads > or Place, View and Track Orders - the Sales application opens.
4. Click Profiles - the *My Profile* page opens.

   You will observe that your products and their details are listed under the *Products* subtab.
5. Click New to create a new product – a blank row appears in the *Products* section.
6. Enter a suitable product name in the respective **Name** field.
7. Enter the desired part number in the respective **Part** # field.
8. **Note**: You will be now be able to identify your product by its name and part number.
9. Click ▾ beside the *Type* drop-down list to specify the required product type.

   Note: A list of product types appears.

10. Select the required product type from the list items.

    Note: You will observe that the **Source** and **Orderable** fields are auto-populated. The **Source** field indicates whether a product is a CPG or a Dealer Product. The **Orderable** field indicates if the product can be ordered by the customer. The **Orderable** field can be cleared. Clearing this field will restrict the product from your quote product list (inactivate the product).
11. Enter a suitable description for the product in the **Description** field.

    Note: This is not a required field, however it is advisable to populate this field as it will enhance the appearance of your quote.
12. Enter a suitable marketing name for the product in the **Marketing Name** field.

    Note: This is not a required field, however it is advisable to populate this field as it will enhance the appearance of your quote.
13. You have now successfully created your product. However, additional steps are required to add this new product to your pricelist.
14. Click to ensure that the new product is displayed in the price list - the *Screens* and *Screens and Views* sections are displayed.

Dealer Setup

15. Click Administration - Pricing - you will now be able to view your dealer pricing in the *Price List* section.

    Note: If you opt to utilize multiple price lists to deliver tiered pricing to your dealers, you will have the opportunity to set and manage multiple price lists here. The pricelist will appear as a hyperlink such as . 99304_Quote_PriceList .You can add your product to any of these pricelists.

16. Click the required quote price list hyperlink.

    Note: You will notice that the product you created is not visible under the *Products* subtab.

17. Click New to add the newly created product to the price list – the *Add Product* section appears.

    Note: You will have to locate and select the product you wish to add. You may utilize the search field to filter your product list to quickly find the product or products you wish to add.

18. Select the product(s) you would like to add to the price list and click Add.

    Note: The product that you created can now be seen in the product list.

19. Enter the appropriate cost of the product in the **Cost** field.

20. There are numerous ways to update the price that you will offer to dealers. You have the option to enter the appropriate cost markup percentage in the respective **% Cost Markup** field. Alternatively you can enter a profit margin percentage in the **% Profit Margin** field. Both of these options will update the list price once you input the percentages. Another option to update your pricing is the **Price Override** field. This field allows you to set the price of the product without the use of markup or profit margin %.

21. Enter the values in the required field – once the products are added to your price list you need to click Apply.

22. Click Clear Cache.

    The product(s) is successfully added to the price list.

    Note: Fields like **Part#**, **Factory Product**, and **Product Type** are auto-populated and cannot be edited. The **Part#** and the **Product Type** are the same that had been entered previously under the *Products* subtab.

Dealer Setup

Price Management

Purpose: In this Quick Reference Guide, you will learn how to manually change price in the Channel One Portal.

Note: Dealer Specific Products have to be imported to the product profile and added to your price list before pricing can be edited. To learn how to add import products and add them to a price list, please refer to the quick reference guide on **Product Management.**

1. Click Sales - the *Sales* drop-down list appears.
2. Click Leads, Quotes and Orders - the *Leads, Quotes and Orders* page appears.
3. Click either Manage Leads > or Place, View and Track Orders - the Sales application opens.
4. Click located in the black navigation bar - the site map of the Sales application appears.
5. Click Price Lists - the *Price Lists* section appears.

   Note: You can see the information for existing price lists such as **Name, Price List Type, Currency,** and **Description**. The **Currency** and **Price List Type** fields are auto-populated whenever a new price list is created.
6. Click the **Price List** hyperlink – the price list details appears.

   Note: You can use the three sections: **% Cost Markup, % Profit Margin** and **Price Override** to manually change a product's price.
7. **Note**: The **Cost** of a product is set by your distributor. You can add a markup percentage or profit margin on the cost to determine its price.
8. Enter your intended value in the **% Cost Markup** field or the **% Profit Margin** field.

   Note: The Channel One Portal auto-calculates the price based on the percentage you entered.
9. **Note**: You may also enter the desired amount in the **Price Override** field to directly enter the price at which you want to sell the product.
10. **Note**: You will have an option to change the price once again when you create a quote. At that time, you will be able to set value for price override or offer discounts for products in a quote. However, those prices will be valid only for that particular quote. When you want to generate a new quote, the base prices will again be uploaded automatically from your price list. To view how to modify prices in a quote proposal, view the quick reference guide on **Work on a Quote.**

Dealer Mobile Device

Quick Reference Guide

1

Mobile Lead Management

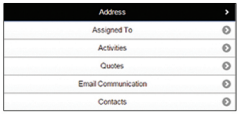
Mobile Lead Management

Create and Work on a Lead

Purpose: To create a lead, add activities, and add contacts for a lead in the Channel One Portal using a tablet device please reference the following.

1. Tap Sales - the *Sales* drop-down list appears.
2. Tap Leads, Quotes and Orders - the *Leads, Quotes and Orders* page appears.
3. Tap Manage Leads > - The *Leads* list appears.
4. Tap the lead's tab – additional information about the lead appears.

   Note: Please ensure you are utilizing your tablet in landscape view.
5. Below the lead's details section, you can see the following accordions:



   These accordions can be utilized to take action on a lead.
6. Tap the required accordion – the respective accordion is expanded.
7. Tap Accounts / Leads - the leads list appears.
8. Tap Add - a new form appears in the *Lead* section.
9. Fill in the mandatory fields in the form.

   Note: The mandatory fields are:
   i. **First Name**
   ii. **Last Name**
   iii. **Either Primary Phone** # or **Email**

   The **Status**, **Assigned To**, **Lead Age**, and **Distributor** fields are auto-populated.

   You can use the scroll functionality to view and edit required fields.
10. Tap Save .

    Note: Tap Close if you want to discard the change.
11. Tap Edit - a form for the respective leads appears in the *Leads* section

    Note: From this section, you can update the **Status** of the lead. If required, you may also change the **Address** and **Company Name** details by typing in the details in the respective fields. If you select **Small Business** from the **Market** drop-down list, the Company name becomes mandatory. The **Reason** field is mandatory if the status is updated to **Lost. City, State, Country**, and **Zipcode** fields are mandatory if the **Address Line** is updated. You can view and edit the required fields by using the scrollbar to the right.

Mobile Lead Management

12. Select the appropriate status from the *Status* drop-down list.
    Note: You can manually update the status after completing each of the tasks listed in the drop-down menu. Executing certain activities in the portal such as scheduling a consultation using the **Activities** function will automatically update the lead status once the activity has been marked as completed in the system.
13. You can add or remove lead assignees by tapping the respective **Assigned To** accordion. For more details on assigning leads, please view the Quick Reference Guide on **Assign Leads.**
14. Tap Save.
15. Tap Activities - the *Activities* section is expanded.
16. Tap Add - a new form appears.
17. Select the appropriate activity type from the *Type* drop-down list.
18. Select the appropriate activity status from the *Status* drop-down list.
    Note: If the **Activities** status is set to **Closed**, the lead **Status** is auto-updated. This is another way to update the lead status.
19. Tap Save.
20. **Note:** The system enables you to add multiple contacts under a single lead to help manage your light commercial and small business customers.
    You can add additional contact details for a small business lead and select a primary contact from the available list.
21. Tap Contacts
    - the *Contacts* section is expanded.
22. Tap Add in the *Contacts* section - a new form appears.
23. Enter the required details.
24. Tap Save.
25. Tap Add in the *Address* section – a new form appears.
26. Enter the required details.
27. Tap Save.
    Note: If there are multiple contacts provided for a lead, you can see the list of available contacts in the *Contacts* section. To select one from multiple contacts, you can tap the respective contact.
28. Tap Edit in the *Contacts* section to edit contact details.

29. Tap to view if the contact is primary.
Note: By default, the **Primary** checkbox is selected for the first entry in the contact details and the address fields. If you do not want a contact detail to be the primary contact, you can swipe the slider of the **Primary** checkbox to your left. Note that you can clear the checkbox only if you have multiple contacts for the same lead. Every lead requires a primary contact.

30. **Note:** A lead is considered closed if the status is updated to **Won, Lost, Cancelled,** or **Expired**. You can either manually update the status, or auto-update it via completion of an activity. If the status is updated to **Lost** or **Cancelled**, updating the **Reason** field is mandatory.

Mobile Lead Management

Lead Sizing

Purpose: In this Quick Reference Guide you will learn how to execute the sizing tool for a lead, create a sizing report, and attach it to a quote using a tablet device.

1. You can execute Genset sizing for a lead using the Sizing tool. There are several ways to launch the Sizing tool from the Channel One Portal. If you wish to utilize the sizing tool for an existing lead in the system and want to store the sizing report on the customer account and/or add the sizing report to a quote proposal, you can launch the Sizing tool while creating a quote for a lead in the Sales application.
2. Tap Sales - the **Sales** drop-down list appears.
3. Tap Leads, Quotes and Orders - the *Leads, Quotes, and Orders* page appears.
4. Tap Manage Leads > - The *Leads* list appears on your left.

   Note: You can scroll down to view the complete list.
5. Tap the first name of the respective lead – the lead is selected.
6. Tap the ***Quotes*** accordion – The *Quotes* section appears on your right.
7. Tap Size & Quote - The *Quote Detail* section appears.

   Note: A new quote name and number will be generated for the new quote.
8. Tap Size a Generator - The *Customer* section on the *Estimate Generator Needs* page appears.

   Note: Since you have accessed the Sizing tool via the **Leads** list, the **First Name, Last Name, Email**, and **Address** fields are populated as per the values entered in the *Leads* list.
9. Fill up the mandatory fields in the *Customer* section.
10. Tap Next - the *Location* section appears.

    Note: The fields in this section are not mandatory. However, details entered in these fields help the Genset Sizing tool to estimate more effectively.
11. Tap Next - the *Appliances/Coverage Needs* section appears.
    Note: This is the page where the wattage requirement for a lead is calculated. The red box at the top right, titled *Power Load*, shows the total KW based on the values entered by you in the fields below.
12. Tap the required accordions – the appliances under each category appears.
13. Tap + to add quantity.

    Note: Once you specify the quantity, the **Watts** field is auto-populated. The Sizing tool auto-calculates the standard wattage of each appliance. You may wish to overwrite the wattage if you have more precise information.
14. Tap + on the left of **Add Another Item** to add more appliances.

    Note: A list of product types appears.

15. Tap Next - The *Review Summary* section appears.

    Note: Here, you can review the details captured in the previous sections. You may still modify the values by clicking the *Edit Appliance* link.

16. Tap Next - The *Recommendation* section appears.

    Note: The Sizing tool recommends three options that are the best fit for the customer, based on the details provided in the previous section. These options are either equal to or greater than the required power load for the lead. You can also view the product image and description from the *Recommended Options* list.

17. Select the **Include in Sizing Report** checkbox to include the products in the sizing report.

18. Tap Save & Attach to quote - A confirmation message stating that the sizing report is attached to the quote.

    Note: Once your quote is created, you may send the quote and the sizing report to the customer in a single email.

19. Tap OK .

20. **Note:** You may also tap Email PDF to generate a recommendation email. After Email PDF tapping , you will see *Email Recommendation PDF* dialog box. Once you draft the email on the dialog box, tap Send to dispatch the email.

21. Tap ☒ to close the Sizing tool tab. You will see the *Quote Detail* section once again.

    Note: You can now add products and create a quote. For more details on creating a quote, please refer to the Quick Reference Guide on **Work on a Quote** using a tablet device.

22. Tap Step 6: Attach Documents & Email to view the sizing report.

    Note: The sizing report appears in the *Attachments* section.

23. **Note:** If you want to launch the tool directly from the Channel One Portal homepage, tap the link under the *Estimate Power Generator Needs* section. This will allow you to quickly launch a standalone sizing report. You will be required to enter customer contact information. You will have the opportunity to email the sizing report to your customer or save the sizing report to your local desktop. However, sizing reports generated in this manner will not be tied to a customer record in the system.

    You can also launch a standalone sizing report by tapping Launch Tool from the *GenSizing Tool* page. You will be able to navigate to the *GenSizing Tool* page from the *Sales* drop-down list.

2

Mobile Quoting

Mobile Quoting

Create a Quote

Procedure: In this Quick Reference Guide you will learn how to create and modify a quote in the Channel One Portal via your tablet.

1. Click **Sales** - the *Sales* drop-down list appears.
2. To create quotes from the Channel One Portal homepage, from the **Sales** drop-down list, select **Leads, Quotes and Orders**. **Leads, Quotes and Orders**
3. To navigate to the leads list, tap the **Manage Leads >** link. **Manage Leads >**
4. You can now view the **Leads** section, under **Accounts/Leads**. On the left, you can see the **Leads** section containing the lead's name, **Lead Age, Status,** and **Company details.** On the right, you can see additional information about the lead.
5. To view additional information about the required lead, tap the lead's tab on the left.
6. You can now see the lead's details such as **Source, Email,Primary Phone # (no.), Mobile # (no.), Market, Application, Address Line 1, City, State, Zipcode, Assigned To, Reason,** and **Comments.**

   Below the lead's details section, you can see accordions such as **Address, Assigned To, Activities, Quotes, Email Communications**, and **Contacts.**
7. To generate a quote for the lead, tap the **Quotes** accordion.
8. Note that as you tap an accordion, the lead's detail section moves to your left and the respective accordion is expanded on the right. In the **Quotes** section on the right,you can view the quotes already created for the lead.
9. To create a new quote for the lead, tap **Size & Quote.**

   Size & Quote
10. Tapping **Size & Quote** takes you to the **Quote Detail** section and starts the quote creation process. You also have the opportunity to tap **Size a Generator** from this view. Selecting this button grants you access to the residential sizing tool. To learn more about the residential sizing tool, please refer to the demo — **Execute Sizing for Lead.**
11. In the **Quote Detail** section, you can see the **Quote #** (no.) is auto-generated. You can also see the **Status, Created, Lead, and Sales Rep** fields are auto-populated. Note that the **Quote Total** is $0.00 at present. Below these details, you can see accordions related to the quote.

    You can now add products to the quote by utilizing the product catalog.
12. To add products to your quote proposal, tap the **Step 1: Select Products** accordion.
13. As you tap the accordion, note that the **Quote Detail** section, along with the accordions, moves to your left. The **Select Products** section appears on your right.

Mobile Quoting

14. The **Select Products** section is the product catalog, which contains Cummins Power Generation (CPG) products, as well as distributor or dealer specific products and services. The product catalog is utilized to build customer quotes and place dealer orders.

    You can swipe up or down to view the entire list. You may also use the search functionality to locate a product.

    Search | Product

15. To select a product from the list, tap it.

16. Once you select a product, you can check if it's available in the distributor and factory inventories. Besides, you may also specify the quantity and add the product to your quote list.

17. To verify if the required product is available, tap **Check Inventory.** Check Inventory

18. If the product is available in distributor inventory, a confirmation message appears and the system provides you with an estimate of the number of days required to ship the product. If the product is not available in distributor inventory, the system will then check factory inventory. If the product is available in factory inventory, the system will provide you with an estimate of the number of days required to ship the product. If the product is not available at the distributor or at the factory, the dealer portal will provide lead time and shipping time estimates.

19. To specify the product quantity, you need to tap the **Quantity** field, and enter the required number.

20. To add the product to the quote, tap **Add Item**. Add Item

21. You can now see a confirmation message informing you that the product has been added to the list.

22. To view compatible ATS, you may navigate to the **Step 2: Add Compatible ATS** accordion.

23. To add compatible ATS for the selected gensets, tap the **Step 2: Add Compatible ATS** accordion.

24. Notice that the **Quote Product List** appears on the upper part of the screen. This list contains all the products you have selected in the **Step 1: Select Products** accordion.

25. The **Compatible ATS** list only contains ATS that are compatible with the selected genset. The selected genset is the genset that is highlighted in the **Quote Product List**. To generate a new list of compatible ATS or accessories, you can simply tap another genset on the list. The list of compatible ATS changes as per the selected genset in the **Quote Product List.**

26. To add an ATS to the quote list, from the **Compatible ATS** list, tap the required product.

27. To confirm the selection, tap Add Item. Add Item

28. The selected ATS is now available in the **Quote Product List.**

29. To add compatible accessories to the quote list, tap the **Step 3: Add Compatible Accessories** accordion.

30. Following a procedure similar to adding a compatible ATS, you can now add compatible accessories.

Mobile Quoting

31. To add distributor products to the quote list, tap the **Step 4: Add Distributor Products accordion.**

32. Following a procedure similar to adding a compatible ATS, you can now add distributor products. However, note that there is no compatibility check for the dealer and distributor products.

33. To view the quote details, tap the **Step 5: View Proposal** accordion.

34. You can now see the **Quote Summary** section. In this section, you can review the quote details. You can see the list of products you have added to the **Quote Product List.** Note that the total amount has been auto-updated as per the products you have selected.

35. To select a product, from the quote summary, tap the appropriate product.

    For this demonstration, we will select the product in the topmost row.

36. To modify the details, in the **Quote Summary** section, tap **Edit**. 

37. Using the form, you can modify the quantity and price, add discounts, marketing description, and notes.

38. Product catalog pricing is set up beforehand. However, there can be instances when you want to modify your pricing on the fly for one particular customer. There are two ways to adjust prices on the fly:
    i) Set a discount on individual products in the proposed quote
    ii) Override prices of individual products in the proposed quote

39. To set a discount for a selected product, from the **% Discount** drop-down list, select the required discount value.

40. You can see the **Final Price** field is updated as per the value selected in the **% Discount** field.

41. To override the price of a product, you can enter the desired price in the respective **Price Override** field

42. You will observe that the final price of that particular product has changed as per the value entered in the **Price Override** field.

43. To save the changes, tap **Save**. 

44. Once you finalize your quote, you can generate a proposal and send it to the lead via email.

45. The application allows you to decide whether you want to show the price of the individual products in the quote. You can show line item pricing using the **Show Itemized Price** option, if this box is not checked the quote will be displayed as a lump sum price.

46. To navigate to the **Show Itemized Price** field, in the **Quote Detail** section, tap the down arrow. 

47. The **Quote Detail** section is now expanded. You can now see the **Show Itemized Price** field. By default, it is disabled.

48. To ensure that the field is editable, in the **Quote Detail section**, tap **Edit**.
    After tapping **Edit**, you can also modify other details in the **Quote Detail section**. 

Mobile Quoting

49. If you want to ensure that the price of each product is displayed on the proposal, you need to swipe the slider to select the **Show Itemized Price** checkbox.
Please note that if you wish to provide your customer with a summary quote masking line item pricing, DO NOT select this checkbox.

50. To save the changes, tap **Save**. Save

51. Once you finalize a quote, you can generate a proposal from it. You can then share the proposal with the lead.

52. To access the option to generate a proposal, in the **Quote Detail** section, tap **Menu**. Menu

53. To generate proposal, from the Menu drop-down list, tap **Generate Proposal**. Generate Proposal

54. A confirmation message appears.

55. You will notice that the status of the proposal has been changed to **Proposal Generated**.
Using the **Status** drop-down menu, you can later change the status of the quote to a desired value.

56. To view the proposal, tap the **Step 6: Attach Documents & Email** accordion.

57. You can view the proposal in the **Attachments** section.

58. To download and view the proposal, tap the download arrow.

59. The proposal opens as a PDF in a new tab.

60. To ensure that the proposal is attached to the email, you need to swipe the **Select File** slider to the right.

61. You have successfully attached the quote to the email.

62. To add a marketing brochure to an e-mail, in the **Marketing Material** section, tap **Add**. Add

63. You can now see the list of available marketing materials.

64. To identify the required marketing materials, from the list, tap them.

65. To add the selected items, tap **Add**. Add

66. To ensure that the marketing materials are sent along with the e-mail, you need swipe the respective **Select File** slider to the right.

67. You may add or edit recipient IDs subject line, mail body, and comments as required. You can also enter multiple email IDs, separating them with a semicolon.

68. You will notice that the leads email will default into the "To" column. Our recommendation is that you replace this email address with your own, email the documents to yourself and then use your email to forward the proposal and supporting documents to the customer. This is necessary as the system generated emails will come from a generic email address and customers will not be able to respond to respond to the generic email.

    To send the email to the desired recipient, tap **Send Email.** Send Email

69. You can now see the confirmation message, indicating that the email has been sent.

3

Mobile Ordering

Mobile Ordering

Place an Order

Purpose: In this Quick Reference Guide, you will learn how to check inventories, view product catalogs, order Genset Compatible Automatic Transfer Switches, and generate order summaries.In addition you will also learn about how the portal utilizes email notifications.

1. Tap Sales - the *Sales* drop-down opens.
2. Tap Leads, Quotes and Orders - the *Leads, Quotes and Orders* page appears.
3. Tap Place, View and Track Orders > - the Orders tab opens.
4. Tap Add - a new form appears with an auto-populated **Order #**.
5. Tap Step 1: Shop Products - the *Select Products* section appears.

   Note: From this view, you can edit the order details by tapping Edit.
6. Tap the required product to select it.

   Note: You may use the search option to locate a product.
7. Tap Check Inventory - a confirmation message appears.

   Note: If the product is available in distributor inventory, a confirmation message appears and the system provides you with an estimate of the number of days required to ship the product. If the product is not available in distributor inventory, the system will then check factory inventory. If the product is available in factory inventory, the system will provide you with an estimate of the number of days required to ship the product. If the product is not available at the distributor or at the factory, the dealer portal will provide lead time and shipping time estimates.
8. Tap OK.
9. Enter the required value in the **Quantity** field.
10. Tap Add Item - a confirmation message appears.
11. Tap OK .

    Note: You can repeat this process to add multiple items.
12. Tap Step 2: Add Compatible ATS - the *Add Compatible ATS* section appears.
13. **Note:** The *Compatible ATS* list only contains ATS that are compatible to the selected genset. The selected genset is the genset that is highlighted in the order cart. To generate a new list of compatible ATS or accessories, simply tap another genset in the cart. The list of compatible ATS changes as per the selected Genset in the **Order Cart.**
14. Tap the required product.
15. Tap Add Item .
16. Tap Step 3: Add Compatible Accessories - the *Add Compatible Accessories* section appears.
17. Tap the required product.
18. Tap Add Item .

Mobile Ordering

19. Tap Step 4: Add Distributor Products - the *Add Distributor Products* section appears.

    Note: Distributor products are non-CPG products that are sold by distributors. There is no compatibility checker in the distributor products list. Therefore, you can view all the available distributor products here.

20. Tap the required product.

21. Tap Add Item.

22. Tap Step 5: View Order and Checkout - the *View Order and Checkout* section appears.

    Note: In this section, you can review the order details. You can see the list of products you have added to the **Order Cart**. Note that the total amount has been auto-updated as per the products you have selected.

23. Tap Edit to modify your order.

24. Tap Save.

25. Tap Menu - the *Menu drop*-down list appears.

26. Tap Submit Order - a confirmation message appears.

    Note: If your dealer's profile is configured to receive order status email notifications, your dealer will receive a system generated email notification confirming the order submission.The email will be sent to the dealers registered email address.

27. Tap OK - the status of the order is updated to **Submitted.**