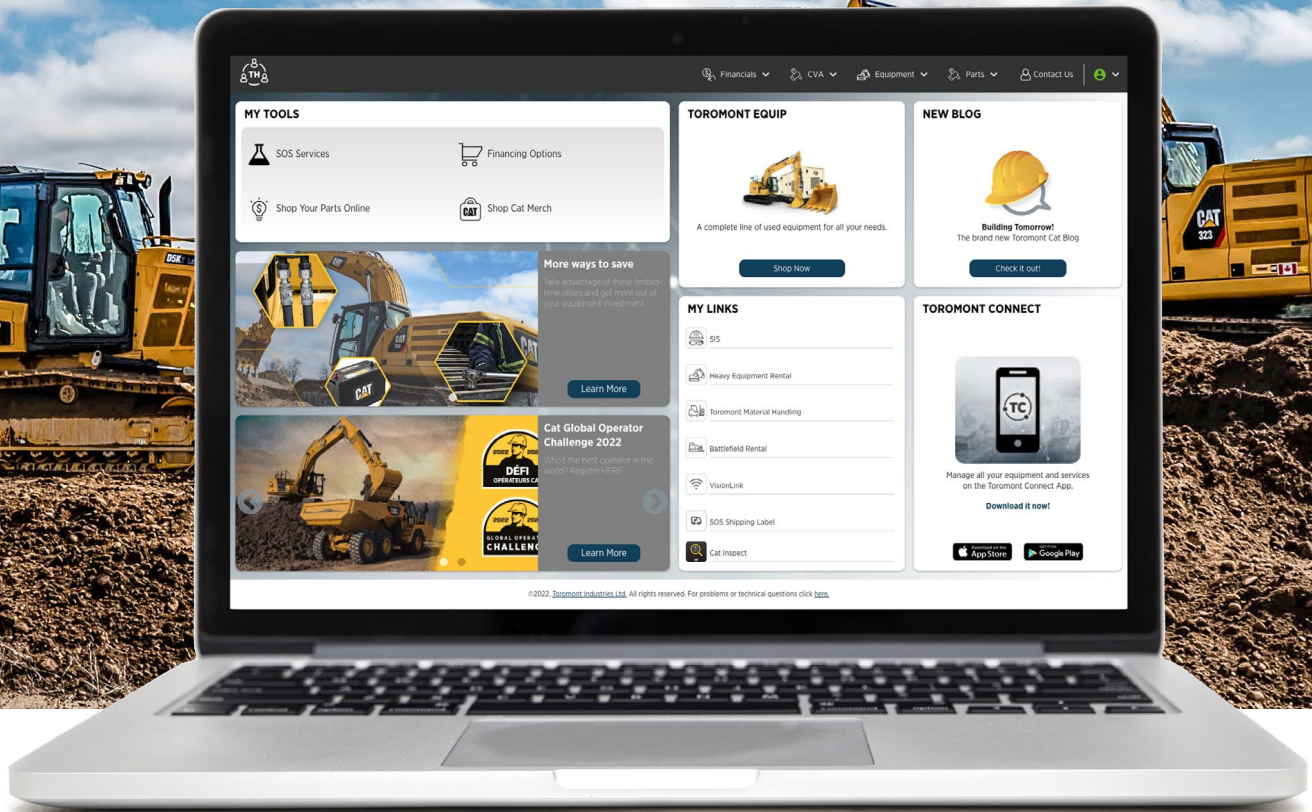




TOROMONT HUB User Guide

Version 2



Administrative tasks made easy

Welcome to Toromont Hub, your secure online portal to access invoices, Customer Value Agreements (CVAs), equipment data, and more.

This user guide will walk you through your Toromont Hub account step by step.

Contents

1 User Management	1
1.1 Access Levels	1
1.2 User Types	1
1.3 User Groups	1
1.4 Create – New User	2
1.5 Create – User Account in a Company	3
1.6 Create Group - Company	4
1.7 Assign User(s) – Group Within a Company	5
2. Financial Management	6
2.1 Invoice - Locate	6
2.2 Invoice – Filter by Account	6
2.3 Supporting Documentation	7
2.4 Invoice – Approval	8
2.5 Invoice Status – Multiple	9
2.6 Invoice Approval – Levels	10
2.7 Invoice - Print	11
2.8 Invoice – Export MS Excel	12
2.9 Invoice Approval	13
2.9.1 Supporting Documents	13
2.9.2 Statuses	14
2.9.3 Modify Statuses	15
2.9.4 Delete a Status	16
2.10 Monthly Statements	17
3 List Function	18
3.1 Invoice Lookup – Search	18
3.2 Invoice Types – Filter	19
3.3 Invoice Lookup – hide columns	19
3.4 Invoice Lookup – Save View	20
4 Customer Value Agreement (CVA)	21
4.1 View Equipment List	21
4.2 CVA – View Equipment Repair History	22
4.3 CVA – View Contract Invoices	22

5 Equipment List	23
5.1 Equipment – View Fleet	23
5.2 Equipment – Add Equipment	23
5.3 Equipment – Modify Equipment Details	24
5.4 Equipment – Delete	25
5.5 Equipment – View SMU (Service Meter Unit)	26
5.6 Equipment – View Configuration	26
5.7 Equipment – Request Connectivity	27
5.8 Equipment – Request Service	28
5.9 Equipment – Service Repair Status	29
5.10 Equipment – Approve Service Quote/Proforma	30
5.11 Equipment – Dispute Service Quote/Proforma	31
5.12 Equipment – Messaging for Service Request	32
5.13 Equipment – Map View & Map History	33
5.14 Equipment – Work Order	34
5.15 Equipment – Notes	35
6 Parts	36
6.1 Parts – View	36
7 Parts.cat.com (PCC)	37
7.1 PCC Access – Parts Order	37
7.2 PCC Access – Create an Account	38
7.3 PCC Access – Benefits	38
8 VisionLink Access	39
9 Assistance	41



1 User Management

1.1 Access Levels

<input checked="" type="checkbox"/> Is Admin
<input checked="" type="checkbox"/> Web Access <input checked="" type="checkbox"/> Mobile Access

Admin

- If your company has an Admin assigned, they have the ability to perform tasks in the Admin Menu
- If your company DOES NOT have an Admin assigned, someone from the Digital team can grant them this power, or the Digital team can handle all requests
- Has the ability to add, modify or delete users in the company
- Has the ability to add, modify or delete groupings in the company
- Assign groups/security levels where certain groups have access to certain modules (invoices, equipment list, etc.) and/or child company accounts

Web Access

- Will provide access for users to Toromont Hub

Mobile Access

- Will provide access for users to Toromont Connect

1.2 User Types

Customer User

- Any customer users
- Has access to both web and mobile applications, depending on Admin's assigned preferences

Customer Admin

- Requires Admin approval from Toromont Digital team
- Has the authorization to manage users (delete, add, modify which groups/modules users can view) and assign child companies/accounts to users
- If there is no Customer Admin, a member of the company can manage users

1.3 User Groups

User groups are used to assign companies to the users and to restrict modules/accounts from certain users.

User groups can be created/modified by Customer Admins and Toromont Admins only.

1.4 Create - New User

- › Select company name
- › Select “User Management” in “Admin” menu
- › If user is NOT found, select “Add new user”
- › Input user information (email*, first/last name*, phone number, extension number), assign user type, assign user group
- › Assign language depending on preference
- › Assign user role (admin, web access, mobile access)

**Required fields to populate*

The screenshot displays the Toromont Hub Admin interface. At the top, there is a navigation bar with the TH logo on the left and several menu items: Financials, CVA, Equipment, Parts, Admin (highlighted in green), Contact Us, and Michael - Toromont CAT Demo. Below the navigation bar, there are three main sections: MY TOOLS (with Latest Deals & Offers and Financing Options), TOROMONT EQUIP (with a red arrow pointing to it), and NEW BLOG. The 'Add New User' form is open, showing the following fields and options:

- Email* (required)
- First Name* (required)
- Phone Number
- User Type: Customer User (selected)
- Language: English (selected), French
- User Role: Admin (unchecked), Web Access (checked), Mobile Access (checked)
- Display Name (Optional)
- Last Name* (required)
- Extension Number
- User Group: Full Access (selected)

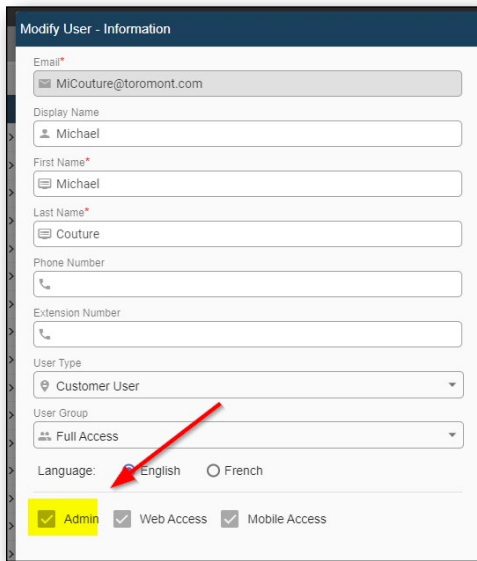
A button labeled "CREATE USER & SEND INVITATION EMAIL" is located at the bottom right of the form.

1.5 Create – User Account in a Company

- › Select “User Management” from the “Admin” menu
- › Check user to see company accesses under “Update Profile”
- › Assign “Admin” role privileges
- › Brief customer on their ability to control, create and/or delete other company users



Email (Login Name)	Display Name	First Name	Last Name	Primary Phone	Last Login	Last Accessed
DSum@toromont.com	Update Profile		Sum		05/13/2022 11:19:51 AM	
ELieberman@toromont.com	Update Group		Lieberman		07/21/2022 2:15:20 PM	07/21/2022 2:16:30
GFeaver@toromont.com	Send Invitation		Feaver		07/21/2022 2:48:10 PM	07/27/2022 10:32:3



Modify User - Information

Email*
MICouture@toromont.com

Display Name
Michael

First Name*
Michael

Last Name*
Couture

Phone Number

Extension Number

User Type
Customer User

User Group
Full Access

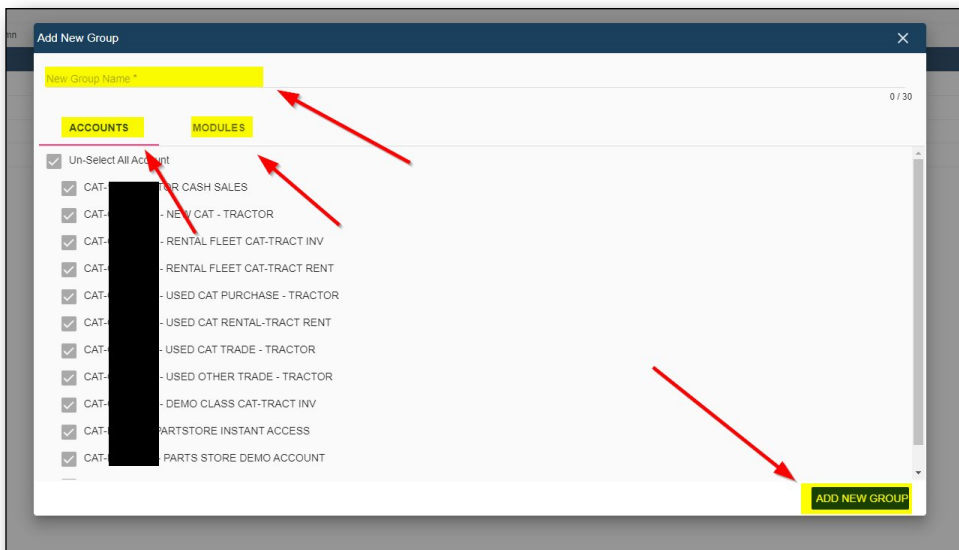
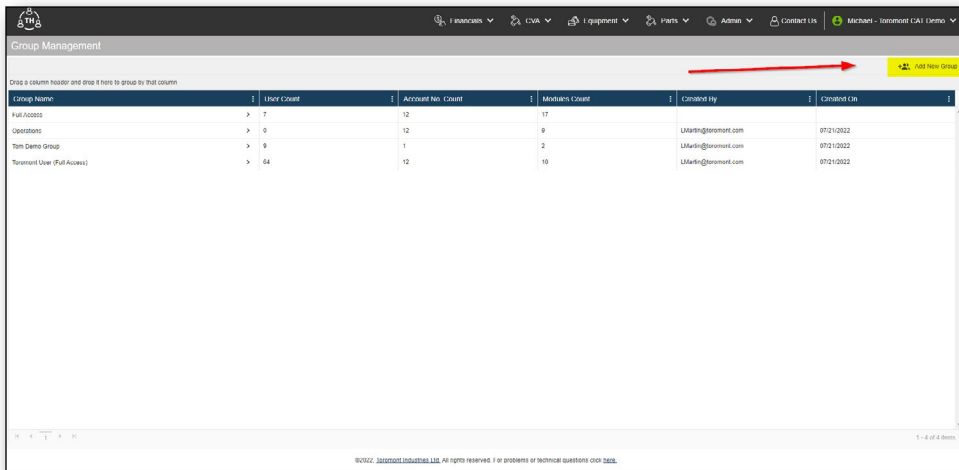
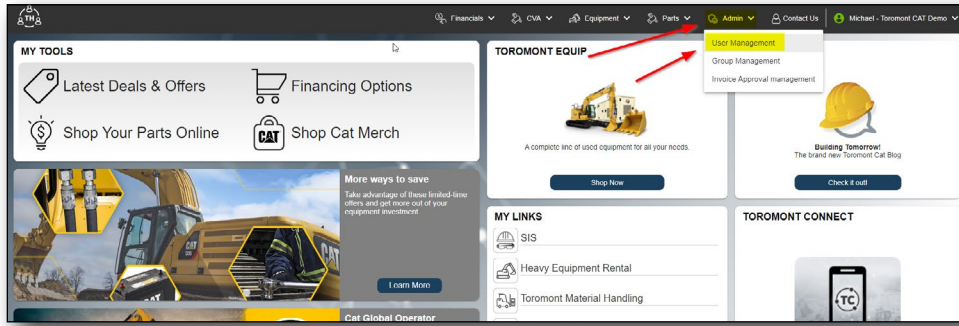
Language: English French

Admin Web Access Mobile Access

1.6 Create Group - Company

From the Home screen:

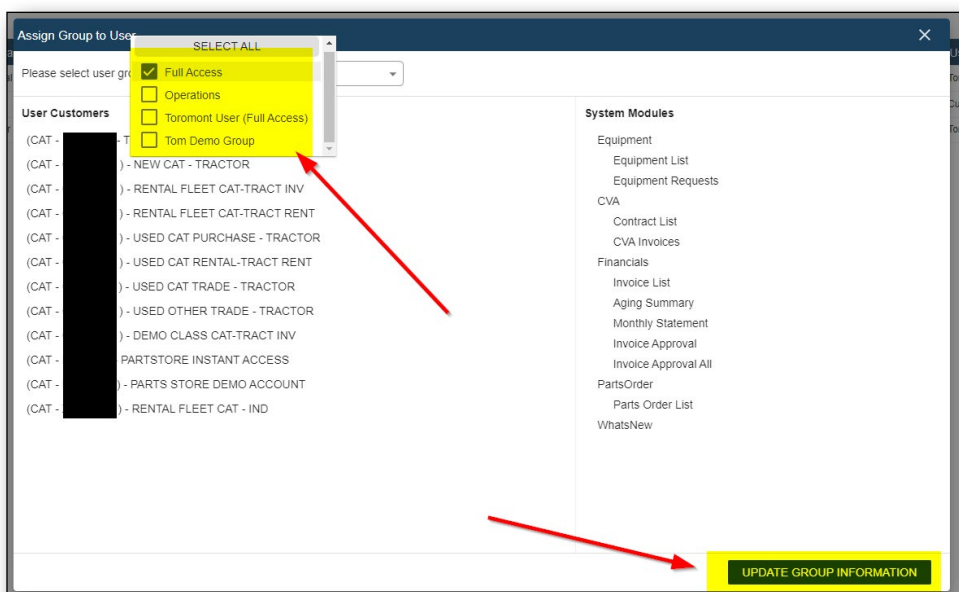
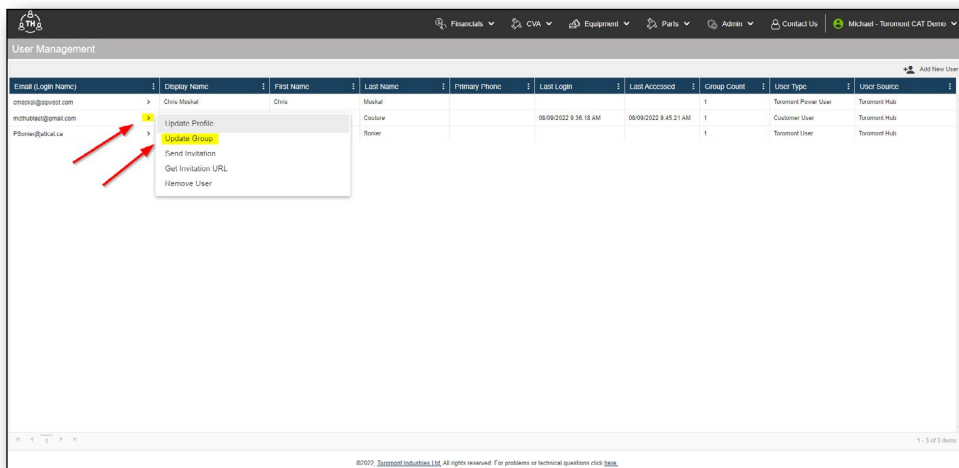
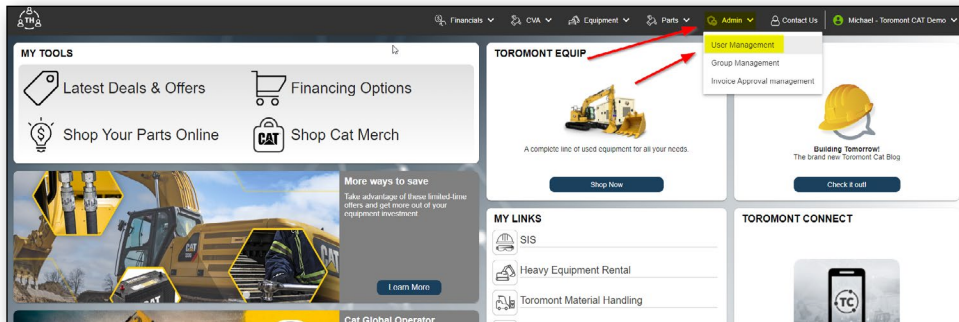
- › Select “Group Management” from the “Admin” menu
- › Create group name
- › Select account(s) for this group
- › Select “Modules” for this group
- › Select “Add New Group”



1.7 Assign User(s) – Group Within a Company

From the “Admin” menu:

- › Select “User Management”
- › Select the arrow beside the email (login name) of desired user
- › Select “Update Group”
- › Multi-select groups you want to assign the user



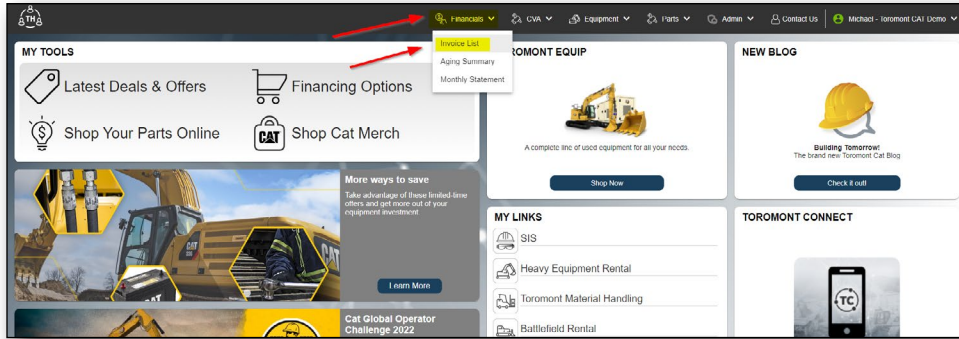


2. Financial Management

2.1 Invoice - Locate

From the Home screen:

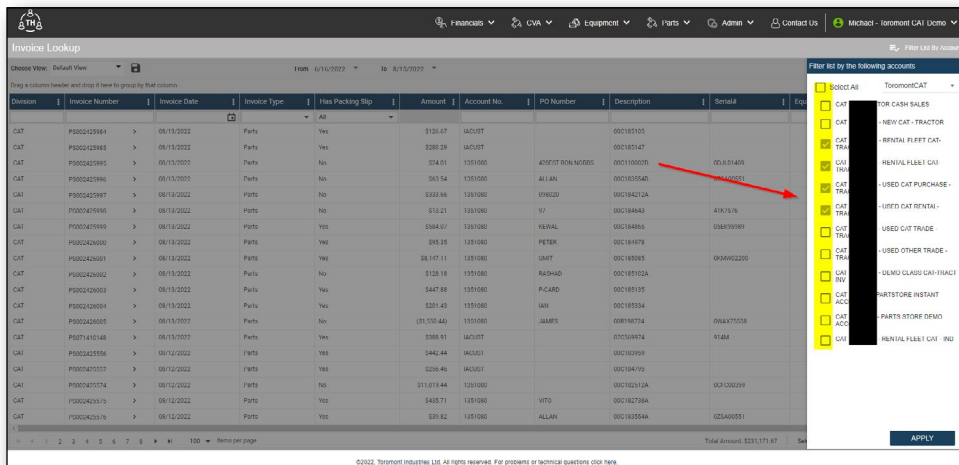
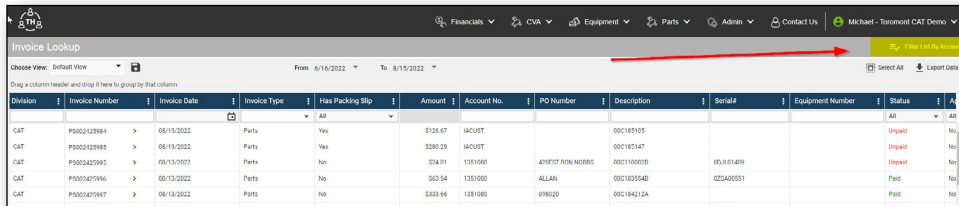
- › Select the “Financials” menu
- › Select “Invoice list”



2.2 Invoice - Filter by Account

From the Home screen:

- › Select the “Financials” menu
- › Select in top right corner “Filter List By Account”
- › Select/unselect accounts associated with company



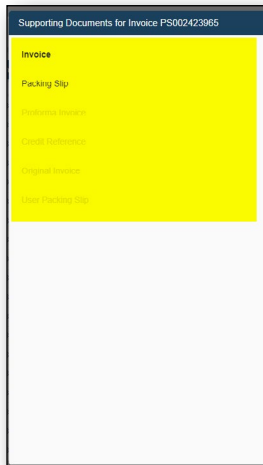
2.3 Supporting Documentation

On the “Invoice Lookup” screen:

- › Select the desired invoice
- › Select the black arrow beside the invoice number
- › Select “View Supporting Documents”

The screenshot shows the 'Invoice Lookup' interface with a table of invoices. The table columns include Division, Invoice Number, Invoice Date, Invoice Type, Has Packing Slip, Amount, Account No., PO Number, Description, Serial#, Equipment Number, and Status. A red arrow points to the black arrow next to the invoice number PS002429965 in the second column.

Division	Invoice Number	Invoice Date	Invoice Type	Has Packing Slip	Amount	Account No.	PO Number	Description	Serial#	Equipment Number	Status
SKL	PS002429964	08/13/2022	Parts	Yes	7126.67	JAC20T		00C180325			Unpaid
SKL	PS002429965	08/13/2022	Parts	Yes	6286.29	JAC20T		00C180347			Unpaid
CAT	PS002429969	08/13/2022	Parts	No	624.01	1351080	425537-NON-NO885	00C110028	00-A01100		Unpaid
CAT	PS002429974	08/13/2022	Parts	No	940.54	1351080	ALLAN	00C183556	025A0551		Paid
CAT	PS002429977	08/13/2022	Parts	No	3333.66	1351080	08620	00C1842126			Paid
CAT	PS002429998	08/13/2022	Parts	No	516.21	1351080	97	00C184843	41K7576		Unpaid
CAT	PS002429999	08/13/2022	Parts	Yes	3586.07	1351080	KEGAL	00C184885	05B35989		Unpaid
CAT	PS002430000	08/13/2022	Parts	Yes	366.35	1351080	PETTR	00C184878			Unpaid
CAT	PS002430001	08/13/2022	Parts	Yes	55,147.11	1351080	UMAT	00C185085		03MAM0700	Unpaid
SKL	PS002430002	08/13/2022	Parts	No	3128.18	1351080	RAISHAD	00C185102A			Unpaid
SKL	PS002430003	08/13/2022	Parts	Yes	3447.88	1351080	P-CARD	00C185126			Unpaid
SKL	PS002430004	08/13/2022	Parts	Yes	5201.42	1351080	IAN	00C185204			Unpaid
CAT	PS002429693	08/13/2022	Parts	No	(51,550.46)	1351080	JAMES	00R189724	09WA79558		Unpaid
CAT	PS017410148	08/13/2022	Parts	Yes	3386.91	JAC20T		07C569974	9148		Paid
CAT	PS002429556	08/13/2022	Parts	Yes	3442.44	JAC20T		00C183959			Paid
CAT	PS002429557	08/13/2022	Parts	Yes	3256.46	JAC20T		00C184797			Unpaid
CAT	PS002429574	08/13/2022	Parts	No	\$11,018.44	1351080		00C182312A	09PC0859		Unpaid
CAT	PS002429575	08/13/2022	Parts	Yes	5435.71	1351080	VITO	00C183738A			Unpaid
CAT	PS002419576	08/13/2022	Parts	Yes	659.82	1351080	ALLAN	00C183554A	025A0551		Paid



2.4 Invoice - Approval

Note: If a status is set to red level, a note is mandatory from the user.

- › Find the specific invoice you want to approve
- › Select the invoice and it will turn dark grey
- › On the top right select “Approve”
- › Change the status to “Approved” (ready for payment)
- › Select the person you want to submit this to
- › Add any notes
- › Click “Submit”

Invoice Number	Invoice Date	Invoice Type	Amount	Account No.	PO Number	Description	Serial#	Equipment Number	Status	Approval Level
PS00242366	08/06/2022	Parts	\$361.44	1351000		QUOTE	00C180261		Updatd	Not Processed
PS00242367	08/09/2022	Parts	\$1,842.93	1391000	JAMES		00C180262A	09A170008	Updatd	Not Processed
PS00242368	08/09/2022	Parts	\$2,388.27	1391000		PAYMENT PORTAL	00C104466		Updatd	Not Processed
PS00242369	08/09/2022	Parts	\$709.02	1391000	IAN		00C100786	004600174	Updatd	Not Processed
PS00242370	08/09/2022	Parts	\$463.81	1391000		PAYMENT PORTAL	00C100917		Updatd	Not Processed
PS00242371	08/09/2022	Parts	\$71.23	1391000	JAGJIT		00C101048	09A130052	Updatd	Not Processed
PS00242372	08/06/2022	Parts	\$316.14	1351000	ANTONIO		00C181193		Updatd	Not Processed
PS00242373	08/06/2022	Parts	\$374.76	1401007			AA0207090		Updatd	Not Processed
PS00242374	08/09/2022	Parts	(331.61)	1401007			08F199693		Updatd	Not Processed
PS00242375	08/09/2022	Parts	\$45.58	1391000	DARNO		00C179154		Updatd	Not Processed
PS00242380	08/09/2022	Parts	\$26.37	1391000	JANE EMP#119		00C179044		Updatd	Not Processed
PS00242381	08/09/2022	Parts	\$231.83	1391000	DOH		00C179054		Updatd	Not Processed
PS00242382	08/09/2022	Parts	\$241.76	1391000	AJEL		00C179059		Updatd	Not Processed
PS00242383	08/09/2022	Parts	\$241.87	1391000	BRAND		00C179049	017607171	Updatd	Not Processed
PS00242384	08/09/2022	Parts	\$76.46	1391000	STRIV		00C100044		Updatd	Not Processed
PS00242385	08/09/2022	Parts	\$302.71	1391000	SLRIS		00C100048		Updatd	Not Processed
PS00242386	08/09/2022	Parts	\$321.93	1391000	MANNALI		00C180012		Updatd	Not Processed
PS00242387	08/09/2022	Parts	\$240.03	1391000	ENZO		00C180101	081K00416	Updatd	Not Processed

Approve Invoice - PS002426770 (1/1)

Invoice: PS002426770

Status: Not Processed

Sent To: No Followup Required

Customer 1: [Empty]

Customer 2: [Empty]

Customer 3: [Empty]

Notes: [Empty]

SUBMIT

TOROMONT CAT

A Division Of Toromont Industries Ltd.
3131 HIGHWAY 7 WEST, P.O. BOX 8011, CONCORD, ON L4K 1B7 (416) 897-8511
Visit our web site at www.toromontcat.com

PARTS INVOICE

SOLD TO: TOR CASH SALES SHIP TO: PIF VISA

4165919587 COLLECTED BY: [Redacted]

GST/HST # 862136443 RT0001
CST # 100163660 TOR0002

P.O. OR W.O. NO.	DATE	SOLD BY	INVOICE NO.	INVOICE DATE	PAGE
00C188812A	18-08-22	CONCORD MAIN STORE	PS002426770	17-08-22	1

CUST.#	CUST. ORDER #	MAKE & MODEL	SERIAL NUMBER	EQ. NO.	SHIP VIA
1881080	PIF VISA	AA 216B	*CAT0216B70L02S10*		

QTY	PART NUMBER	DESCRIPTION	UNIT PRICE	EXTENSION
1	420-8944	CONNECTION-W	83.16	83.16
1	883-6830	COVER-HEAD	273.42	273.42
1	280-8937	GUARD-BELT	90.26	90.26
TOTAL PARTS				446.84
ONTARIO HST 13%				58.10

GETTING YOUR CAT PARTS JUST GOT EASIER!!
PLEASE VISIT PARTS.CAT.COM TO FIND OUT NOW!

2.5 Invoice Status - Multiple

- › Click and drag your mouse down the list for the desired amount
- › Select “Approve” in the top right corner
- › Select the invoice from the list of multi-selected invoices
- › Set the desired status for the invoice along with who to send to
- › Select the next invoice that needs a status
- › Include any notes
- › Select “Submit”

Invoice Lookup

From: 6/9/2022 To: 8/8/2022

Print Approve Approve All Select All Export Data

Division	Invoice Number	Invoice Date	Invoice Type	Amount	Account No.	PO Number	Description	Serial#	Equipment Number	Status	Approval Level
LST	PS002423964	06/09/2022	Parts	\$368.06	1351000		DYLAN LEATHWOOD	00C179803A		Unpaid	Not Processed
LST	PS002423966	06/09/2022	Parts	\$841.44	1351000		QUOTE	00C1802351		Unpaid	Not Processed
LST	PS002423967	06/09/2022	Parts	\$1,481.53	1351000		JAMES	00C180202A	DMAX22558	Unpaid	Not Processed
LST	PS002423968	06/09/2022	Parts	\$1,188.23	1351000		PAYMENT PORTAL	00C180466A	DMAX00174	Unpaid	Not Processed
LST	PS002423969	06/09/2022	Parts	\$706.89	1351000		IAN	00C180706A		Unpaid	Not Processed
LST	PS002423970	06/09/2022	Parts	\$942.81	1351000		PAYMENT PORTAL	00C180917	DMAX00252	Unpaid	Not Processed
LST	PS002423971	06/09/2022	Parts	\$722.27	1351000		JALST	00C181548		Unpaid	Not Processed
LST	PS002423972	06/09/2022	Parts	\$16.14	1351000		ANTONIO	00C181123		Unpaid	Not Processed
LST	PSAM0223648	06/09/2022	Parts	\$374.70	1351000		JACOST	AMC023095		Unpaid	Not Processed
LST	PS002423968	06/09/2022	Parts	\$59.85	1351000		JACOST	00C180843		Unpaid	Not Processed
LST	PS002423974	06/09/2022	Parts	\$61.58	1351000		DEREK	00C179975A		Paid	Not Processed
LST	PS002423969	06/09/2022	Parts	\$381.57	1351000		JAKE EMP1111	00C1909041		Paid	Not Processed
LST	PS002423962	08/05/2022	Parts	\$20.83	1051000		DAN	00C179405A		Unpaid	Not Processed
LST	PS002423961	08/05/2022	Parts	\$34.76	1051000		AIR	00C179463		Unpaid	Not Processed
SA	PS002423967	08/05/2022	Parts	\$341.89	1051000		BRNO	00C179899	01907171	Unpaid	Not Processed
SA	PS002423968	08/05/2022	Parts	\$18.40	1051000		STIVE	00C180204A		Unpaid	Not Processed
SA	PS002423965	08/05/2022	Parts	\$20.21	1051000		SARH	00C180308		Unpaid	Not Processed
LST	PS002423968	08/05/2022	Parts	\$24.03	1051000		MANFREET	00C100072		Unpaid	Not Processed
LST	PS002423967	08/05/2022	Parts	\$240.03	1051000		END	00C180101	0FTX00416	Unpaid	Not Processed

Total Amount: \$388,352.53 Selected Invoices Amount: \$8,949.35 1 - 25 of 279 Items

Approve

Invoice: PS002423965

Customer: Customer 3

Notes:

Packing Slip Invoice

TOROMONT CAT

A Division Of Toromont Industries Ltd.
3131 HIGHWAY 7 WEST P.O. BOX 8911 CONCORD ON L4K 1B7 (416) 887-5811
Visit our web site at www.toromontcat.com

SOLD TO: TOR CASH SALES
SHIP TO: [REDACTED]
437-220-8585
ON #

GST/HST # 892135443 RT0001
GST # 1021938901 TQ0002

P.S.O. OR W.O.N.O.	DATE	SOLD BY	INVOICE NO.	INVOICE DATE	PAGE		
00C179803A	05-08-22	CONCORD MAIN STORE	PS002423968	04-08-22	1		
CUST #	CUST. ORDER #	MAKE & MODEL	SERIAL NUMBER	EQ NO.	SHIP VIA		
QTY	PART NUMBER	N R	DESCRIPTION	STX	PST EX	UNIT PRICE	EXTENSION
1	8U-7336		ROOSTING GP			328.72	328.72

Approve

Invoice: PS002423965

Customer: Customer 2

Customer 3

Notes:

Packing Slip Invoice

TOROMONT CAT

A Division Of Toromont Industries Ltd.
3131 HIGHWAY 7 WEST P.O. BOX 8911 CONCORD ON L4K 1B7 (416) 887-5811
Visit our web site at www.toromontcat.com

SOLD TO: TOR CASH SALES
SHIP TO: [REDACTED]
437-220-8585
ON #

GST/HST # 892135443 RT0001
GST # 1021938901 TQ0002

P.S.O. OR W.O.N.O.	DATE	SOLD BY	INVOICE NO.	INVOICE DATE	PAGE		
00C179803A	05-08-22	CONCORD MAIN STORE	PS002423968	04-08-22	1		
CUST #	CUST. ORDER #	MAKE & MODEL	SERIAL NUMBER	EQ NO.	SHIP VIA		
QTY	PART NUMBER	N R	DESCRIPTION	STX	PST EX	UNIT PRICE	EXTENSION
1	8U-7336		ROOSTING GP			328.72	328.72

2.6 Invoice Approval - Levels

On the “Invoice Lookup” screen:

- › Select white space underneath
- › Filter by desired approval level

The screenshot shows the 'Invoice Lookup' interface with a table of invoices. A red arrow points to the 'Approval Level' dropdown menu in the top right corner of the table header.

Division	Invoice Number	Invoice Date	Invoice Type	Amount	Account No.	PO Number	Description	Serial#	Equipment Number	Status	Approval Level
CAT	P5002423965	08/06/2022	Parts	\$368.08	1931080		DYLAN LEATHWOOD	00C178925A		Unpaid	Not Processed
CAT	P5002423966	08/06/2022	Parts	\$841.64	1931080		QUOTE	00C180251		Unpaid	Not Processed
CAT	P5002423967	08/06/2022	Parts	\$1,643.33	1931080		JAMES	00C180252A	DNAK72559	Unpaid	Not Processed
CAT	P5002423968	08/06/2022	Parts	\$2,589.27	1931080		PAYMENT PORTAL	00C180466	004E00174	Unpaid	Not Processed
CAT	P5002423969	08/06/2022	Parts	\$709.02	1931080		IAN	00C180786		Unpaid	Not Processed
CAT	P5002423970	08/06/2022	Parts	\$943.81	1931080		PAYMENT PORTAL	00C180917	DNAK30552	Unpaid	Not Processed
CAT	P5002423971	08/06/2022	Parts	\$72.27	1931080		JAGJIT	00C181048		Unpaid	Not Processed
IAI	F0002423972	08/06/2022	Parts	\$376.14	1931080		ANTONIO	00C181123		Unpaid	Not Processed
CAT	F0002423973	08/06/2022	Parts	\$374.70	1931080		ACQUET	AM0232895		Unpaid	Not Processed
CAT	F0002423988	08/05/2022	Parts	(\$59.61)	1931080		ACQUET	08R19563		Unpaid	Not Processed
CAT	P5002423979	08/05/2022	Parts	\$15.56	1931080		DENNIS	00C178975A		Unpaid	Not Processed
CAT	P5002423980	08/05/2022	Parts	\$306.37	1931080		JAKE EMP119	00C179084A		Unpaid	Not Processed
CAT	P5002423981	08/05/2022	Parts	\$231.85	1931080		DON	00C179085A		Unpaid	Not Processed
CAT	P5002423982	08/05/2022	Parts	\$244.76	1931080		AXEL	00C179086		Unpaid	Not Processed
CAT	P5002423983	08/05/2022	Parts	\$541.87	1931080		BRUNO	00C179089	Q1YK07171	Unpaid	Not Processed
CAT	P5002423984	08/05/2022	Parts	\$78.40	1931080		STEVE	00C180044		Unpaid	Not Processed
CAT	P5002423985	08/05/2022	Parts	\$320.21	1931080		SUKH	00C180048		Unpaid	Not Processed
IAI	F0002423986	08/05/2022	Parts	\$32.63	1931080		MANPREET	00C180072		Unpaid	Not Processed
CAT	F0002423987	08/05/2022	Parts	\$240.03	1931080		ENZO	00C180101	QFTK00416	Unpaid	Not Processed

The screenshot shows the 'Invoice Lookup' interface with the 'Approval Level' dropdown menu expanded. A red arrow points to the 'Approved (Ready for Payment)' option.

Division	Invoice Number	Invoice Date	Invoice Type	Amount	Account No.	PO Number	Description	Serial#	Equipment Number	Status	Approval Level
CAT	P5002423965	08/06/2022	Parts	\$368.08	1931080		DYLAN LEATHWOOD	00C178925A		Unpaid	Not Processed
CAT	P5002423966	08/06/2022	Parts	\$841.64	1931080		QUOTE	00C180251		Unpaid	Approved (Pending)
CAT	P5002423967	08/06/2022	Parts	\$1,643.33	1931080		JAMES	00C180252A	DNAK72559	Unpaid	Approved (Ready for Payment)
CAT	P5002423968	08/06/2022	Parts	\$2,589.27	1931080		PAYMENT PORTAL	00C180466	004E00174	Unpaid	Payment Delayed
CAT	P5002423969	08/06/2022	Parts	\$709.02	1931080		IAN	00C180786		Unpaid	Approved in Region
CAT	P5002423970	08/06/2022	Parts	\$943.81	1931080		PAYMENT PORTAL	00C180917	DNAK30552	Unpaid	Not Processed
CAT	P5002423971	08/06/2022	Parts	\$72.27	1931080		JAGJIT	00C181048		Unpaid	Not Processed
IAI	F0002423972	08/06/2022	Parts	\$376.14	1931080		ANTONIO	00C181123		Unpaid	Not Processed
IAI	F0002423973	08/06/2022	Parts	\$374.70	1931080		ACQUET	AM0232895		Unpaid	Not Processed
CAT	F0002423988	08/05/2022	Parts	(\$59.61)	1931080		ACQUET	08R19563		Unpaid	Not Processed
CAT	P5002423979	08/05/2022	Parts	\$15.56	1931080		DENNIS	00C178975A		Unpaid	Not Processed
CAT	P5002423980	08/05/2022	Parts	\$306.37	1931080		JAKE EMP119	00C179084A		Unpaid	Not Processed
CAT	P5002423981	08/05/2022	Parts	\$231.85	1931080		DON	00C179085A		Unpaid	Not Processed
CAT	P5002423982	08/05/2022	Parts	\$244.76	1931080		AXEL	00C179086		Unpaid	Not Processed
CAT	P5002423983	08/05/2022	Parts	\$541.87	1931080		BRUNO	00C179089	Q1YK07171	Unpaid	Not Processed
IAI	F0002423984	08/05/2022	Parts	\$78.40	1931080		STEVE	00C180044		Unpaid	Not Processed
CAT	P5002423985	08/05/2022	Parts	\$320.21	1931080		SUKH	00C180048		Unpaid	Not Processed
IAI	F0002423986	08/05/2022	Parts	\$32.63	1931080		MANPREET	00C180072		Unpaid	Not Processed
CAT	P5002423987	08/05/2022	Parts	\$240.03	1931080		ENZO	00C180101	QFTK00416	Unpaid	Not Processed

2.7 Invoice - Print

On the “Invoice Lookup” screen:

- › Select one or multiple invoices
- › In the top right corner select “Print”
- › Select “Yes” or “No” if you want to also print the additional documents (packing slips, Proforma invoice, etc.)
- › Select printer icon in the top corner

Invoice #	Invoice Number	Invoice Date	Invoice Type	Amount	Account No.	PO Number	Description	Serial#	Equipment Number	Status	Approval Level
IST	P5002423963	06/06/2022	Parts	\$368.08	1351080		DIJAN LEATHWOOD	00C179803A		Unpaid	Not Processed
IST	P5002423964	06/06/2022	Parts	\$841.44	1351080		QUOTE	00C180281		Unpaid	Not Processed
IST	P5002423967	06/06/2022	Parts	\$1,443.33	1351080		JAMES	00C180503A	06W37555B	Unpaid	Not Processed
IST	P5002423968	06/06/2022	Parts	\$2,588.27	1351080		PAYMENT PORTAL	00C180466	00AC09174	Unpaid	Not Processed
IST	P5002423969	06/06/2022	Parts	0.00	1351080		IAN	00C180786		Unpaid	Not Processed
IST	P5002423970	06/06/2022	Parts	2943.21	1351080		PAYMENT PORTAL	00C180917	06W33052	Unpaid	Not Processed
IAI	P5002423971	06/06/2022	Parts	\$72.27	1351080		JALILI	00C181540		Unpaid	Not Processed
IST	P5002423972	06/06/2022	Parts	\$516.14	1351080		ANTONIO	00C181123		Unpaid	Not Processed
IST	P5002423984	06/06/2022	Parts	\$374.70	1351080		MACUST	AA0020396		Unpaid	Not Processed
CAT	P5002423988	06/05/2022	Parts	(\$59.61)	1351080		MACUST	08R18563		Unpaid	Not Processed
CAT	P5002423979	06/05/2022	Parts	\$45.56	1351080		DENNIS	00C178975A		Paid	Not Processed
CAT	P5002423980	06/05/2022	Parts	\$305.37	1351080		JAKE EMP119	00C176084A		Paid	Not Processed
CAT	P5002423981	06/05/2022	Parts	\$731.85	1351080		DON	00C176085A		Unpaid	Not Processed
CAT	P5002423982	06/05/2022	Parts	\$244.76	1351080		AXTL	00C176085		Paid	Not Processed
IAI	P5002423983	06/03/2022	Parts	\$341.87	1351080		BRUNO	00C178979	07Y907171	Unpaid	Not Processed
IAI	P5002423984	06/03/2022	Parts	\$76.40	1351080		STEVIE	00C180044		Unpaid	Not Processed
IAI	P5002423985	06/03/2022	Parts	\$203.21	1351080		SURHI	00C180040		Unpaid	Not Processed
CAT	P5002423986	06/03/2022	Parts	\$23.63	1351080		MANPREET	00C180072		Unpaid	Not Processed
CAT	P5002423987	06/03/2022	Parts	\$203.03	1351080		ENZO	00C180101	07Y000116	Unpaid	Not Processed

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PARTS INVOICE

SOLD TO: TOR CASH SALES
SHIP TO: [REDACTED]

GST/HST # 892135443 RT0001
QST # 1021938901 TQ0002

P.S. OR W/O NO	DATE	SOLD BY	INVOICE NO	INVOICE DATE	PAGE
00C179803A	06-08-22	CONCORD MAIN STORE	P5002423968	06-08-22	1

CUST #	CUST. ORDER #	MAKE & MODEL	SERIAL NUMBER	EQ NO	SHIP VIA
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

QTY	PART NUMBER	DESCRIPTION	STK	UNIT PRICE	EXTENSION
1	90-7936	HOUSING GP	000	\$25.72	\$25.72
		TOTAL PARTS			\$25.72
		ONTARIO HST 13%			42.34

GLOBAL PAYMENTS CONTRIBUTION NO: 165561735638760

2.8 Invoice - Export MS Excel

On the “Invoice Lookup” screen:

- › Select one or multiple invoices
- › In the top right corner, select “Export data”

Invoice Lookup

Choose View: Default View From: 6/10/2022 To: 8/9/2022

Export data

Division	Invoice Number	Invoice Date	Invoice Type	Amount	Account No.	PO Number	Description	Serial#	Equipment Number	Status	Approval Level
CAT	F500241932	08/09/2022	Parts	\$275.50	1351080	TONY	00C181002A	0CKM04171		Unpaid	Not Processed
CAT	F500241933	08/09/2022	Parts	\$191.72	1351080	P-CARD	00C181542			Paid	Not Processed
CAT	F500241934	08/09/2022	Parts	\$50.65	1351080	CHRIS	00C181485			Paid	Not Processed
CAT	F500241935	08/09/2022	Parts	\$511.86	1351080	MSGS06	00C181305			Unpaid	Not Processed
CAI	F500241936	08/09/2022	Parts	\$1,043.00	1201000	MS0606	00C181525A			Unpaid	Not Processed
CAI	F500241937	08/09/2022	Parts	\$92.49	1201000	JAM	00C181567	0EMF01012		Paid	Not Processed
CAI	F500241938	08/09/2022	Parts	\$291.50	1201000	P-CARD	00C181612		CSPH	Unpaid	Not Processed
CAT	F500241939	08/09/2022	Parts	\$730.01	1351080	BRIAN	00C181698	024001995		Unpaid	Not Processed
CAT	F500241940	08/09/2022	Parts	\$6.42	1351080	P-CARD	00C181728			Paid	Not Processed
CAT	F500241941	08/09/2022	Parts	\$87.26	1351080	FRED	00C181765	0SF209308		Paid	Not Processed
CAT	F500241942	08/09/2022	Parts	\$1,541.86	1351080	JAMES	00C181768	0WAX75558		Unpaid	Not Processed
CAT	F500241943	08/09/2022	Parts	\$487.79	1351080	SAH	00C181872	0MPS00120	E123	Unpaid	Not Processed
CAT	F500241944	08/09/2022	Parts	\$51.59	1351080	KHIDEP	00C181919			Unpaid	Not Processed
CAT	F500241945	08/09/2022	Parts	\$1,436.45	1351080	P-CARD	00C181958			Unpaid	Not Processed
CAI	F500241946	08/09/2022	Payment Portal	\$279.12	1301000	PAYMENT PORTAL	00C181964			Unpaid	Not Processed
CAT	F500241947	08/09/2022	Parts	\$382.96	1351080	SURH	00C182173	0M6521610		Unpaid	Not Processed
CAT	F500241948	08/09/2022	Parts	\$151.76	1351080	P-CARD	00C182181	0KAL79822		Unpaid	Not Processed
CAT	F500241949	08/09/2022	Parts	\$9.45	1351080	DENNIS	00R198631			Paid	Not Processed
CAT	F5011441958	08/09/2022	Parts	\$68.84	1351080	JOE	03CA79188	0LMD0216		Unpaid	Not Processed

Total Amount: \$715,803.63 Selected Invoices Amount: \$0.00 1 - 25 of 343 Items

Division	Invoice Number	Invoice Date	Invoice Type	New Parking Slip	Amount	Account No.	PO Number	Description	Serial#	Equipment Number	Status
2	CAT	F500242556	08/12/2022	Parts	2	442.44		00C183959			A
3	CAT	F500242557	08/12/2022	Parts	2	396.46		00C184795			A
4	CAT	F500242558	08/12/2022	Parts	1	1103.64		00C182518	0CFC00359		A
5	CAI	F500242559	08/12/2022	Parts	3	420.71		00C182788A			A
6	CAT	F500242560	08/12/2022	Parts	1	93.87		00C181546	07LAD0511		A
7	CAT	F500242561	08/12/2022	Parts	3	81.24		JAKE #8119	00C183991		A
8	CAI	F500242562	08/12/2022	Parts	2	67.02		JUHN	00C184130	050403147	A
9	CAT	F500242563	08/12/2022	Parts	2	34.8		CARLOS	00C184883	0W8W05228	A
10	CAT	F500242564	08/12/2022	Parts	2	977.91		DEEHA	00C184220		A
11	CAT	F500242565	08/12/2022	Parts	1	124.53		BLACK SERVICES	00C184242	0M3104225	A
12	CAT	F500242566	08/12/2022	Parts	2	25.99		PAIS	00C184281	4877979	A
13	CAT	F500242567	08/12/2022	Parts	1	36.78		ADAM	00C184304		A
14	CAT	F500242568	08/12/2022	Parts	1	16.64		ADAM	00C184348		A
15	CAT	F500242569	08/12/2022	Parts	1	487.68		SCOTT	00C184419		A
16	CAI	F500242570	08/12/2022	Parts	2	100.39		P-CARD	00C184446	0WAX21937	A
17	CAT	F500242571	08/12/2022	Parts	2	465.85		EMF TOMBERRY	00C184611		A
18	CAT	F500242572	08/12/2022	Parts	2	40.79		P-CARD	00C184707		A
19	CAI	F500242573	08/12/2022	Parts	1	286.29		ROD HOLLAWAY	00C184777	0W8W02603	A
20	CAT	F500242574	08/12/2022	Parts	1	702.79		JAMES	08196063	0WAX75558	A
21	CAT	F500242575	08/12/2022	Parts	1	791.28			08198705		A
22	CAT	F500242576	08/12/2022	Parts	1	71.17		SAH	00C181973A	0MFC00126	F123
23	CAT	F500242577	08/12/2022	Parts	2	288.79		P-PORTAL	00C182054		A
24	CAI	F500242578	08/12/2022	Parts	2	3.34		PP VISA	00C182065A	0LH499090	P
25	CAT	F500242579	08/12/2022	Parts	2	6.17		GUJDO MARINUKIC	00C182066A		A
26	CAT	F500242580	08/12/2022	Parts	2	382.96		OREL	00C182084A	0CKM02597	P
27	CAT	F500242581	08/12/2022	Parts	2	297.38		MRS	00C182108	0WAX0216	A
28	CAT	F500242582	08/12/2022	Parts	2	647.53		TALINGER	00C181656	0K510336	P
29	CAT	F500242583	08/12/2022	Parts	2	56.18		BEVIN	00C183372		P
30	CAT	F500242584	08/12/2022	Parts	2	64.38		NOLL	00C183412		A
31	CAT	F500242585	08/12/2022	Parts	2	21.93		P-CARD	00C183477	0KCB3795	P
32	CAT	F500242586	08/12/2022	Parts	2	171.08		P-PORTAL	00C183482	0IS800788	A
33	CAT	F500242587	08/12/2022	Parts	2	364.25		INDIA	00C183483	011608597	A
34	CAT	F500242588	08/12/2022	Parts	2	137.21		ALLAN	00C183554	025A00351	CW118
35	CAI	F500242589	08/12/2022	Parts	2	861.00		BALHAR	00C183676		P
36	CAT	F500242590	08/12/2022	Parts	2	114.4			00C183677		P
37	CAT	F500242591	08/12/2022	Parts	1	100.65		IPHAN	00C183711		P

2.9 Invoice Approval

2.9.1 SUPPORTING DOCUMENTS

On the “Invoice Lookup” screen:

- › Select multiple invoices
- › Select “Approve” in top right corner
- › Select desired invoice
- › In the top right corner view supporting documents associated with specific invoice (packing slips, Performa invoice, etc.)

Invoice Lookup

Choose View: Default View From: 6/9/2022 To: 6/9/2022

Print Approve Approve All Select All Export Data

Invoice Number	Invoice Date	Invoice Type	Amount	Account No.	PO Number	Description	Serial#	Equipment Number	Status	Approval Level
PS002426770	08/05/2022	Parts	\$346.08	1301580		DELAN LEATHWOOD	00C178063A		Unpaid	Not Processed
PS002426769	08/05/2022	Parts	\$441.44	1301580		QUITE	00C180231		Unpaid	Not Processed
PS002426767	08/05/2022	Parts	\$1,441.33	1301580		JAMES	00C180252A	06A323558	Unpaid	Not Processed
PS002426768	08/05/2022	Parts	\$2,288.27	1301580		PAYMENT PORTAL	00C180466	00A0E0174	Unpaid	Not Processed
PS002426765	08/05/2022	Parts	\$309.07	1301580		LIN	00C180786		Unpaid	Not Processed
PS002426762	08/05/2022	Parts	\$943.01	1301580		PAYMENT PORTAL	00C180917	06A323550	Unpaid	Not Processed
PS002426761	08/05/2022	Parts	\$77.77	1301580		JAGUET	00C181048		Unpaid	Not Processed
PS002426760	08/05/2022	Parts	\$16.14	1301580		ANTONIO	00C181122		Unpaid	Not Processed
PS002426759	08/05/2022	Parts	\$14.78	1301580		MICHAEL	00C181299		Unpaid	Not Processed
PS002426758	08/05/2022	Parts	\$89.61	1301580		MICHAEL	00C181563		Unpaid	Not Processed
PS002426757	08/05/2022	Parts	\$46.56	1301580		DENNIS	00C178975A		Unpaid	Not Processed
PS002426756	08/05/2022	Parts	\$306.57	1301580		JAKE EMP#119	00C178985A		Unpaid	Not Processed
PS002426755	08/05/2022	Parts	\$331.85	1301580		DON	00C178985A		Unpaid	Not Processed
PS002426754	08/05/2022	Parts	\$344.76	1301580		AXEL	00C178985		Unpaid	Not Processed
PS002426753	08/05/2022	Parts	\$541.87	1301580		BRINDO	00C178989	01YK07171	Unpaid	Not Processed
PS002426752	08/05/2022	Parts	\$70.48	1301580		STEVE	00C180044		Unpaid	Not Processed
PS002426751	08/05/2022	Parts	\$330.75	1301580		SABOIS	00C180048		Unpaid	Not Processed
PS002426750	08/05/2022	Parts	\$32.83	1301580		MANHILLI	00C180072		Unpaid	Not Processed
PS002426749	08/05/2022	Parts	\$240.03	1301580		SNZO	00C180761	04FK00416	Unpaid	Not Processed

Total Amount: \$208,251.93 Selected Invoices Amount: \$8,319.34 1 - 25 of 720 Items

Approve Invoice - PS002426770 (1/12)

Invoice: PS002426770

Status: Not Processed

Sent To: No Followup Required

Customer 1: [Empty]

Customer 2: [Empty]

Customer 3: [Empty]

Notes: 0 / 500

Submit

1 of 1 Automatic Zoom

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PARTS INVOICE

SOLD TO: TOR CASH SALES SHIP TO: PIF VISA

4169919957 COLLECTED BY: ON #

P/S/O OR W/D/O	DATE	SOLD BY	INVOICE NO.	INVOICE DATE	PAISE
00C188812A	13-05-22	CONCORD MAIN STORE	PS002426770	17-08-22	1

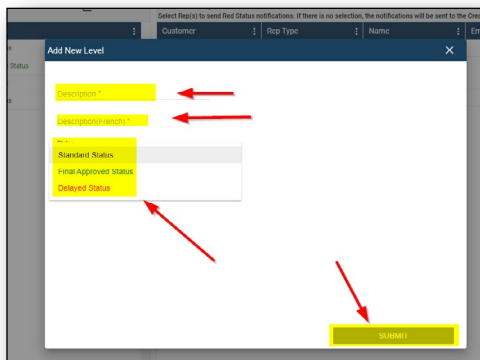
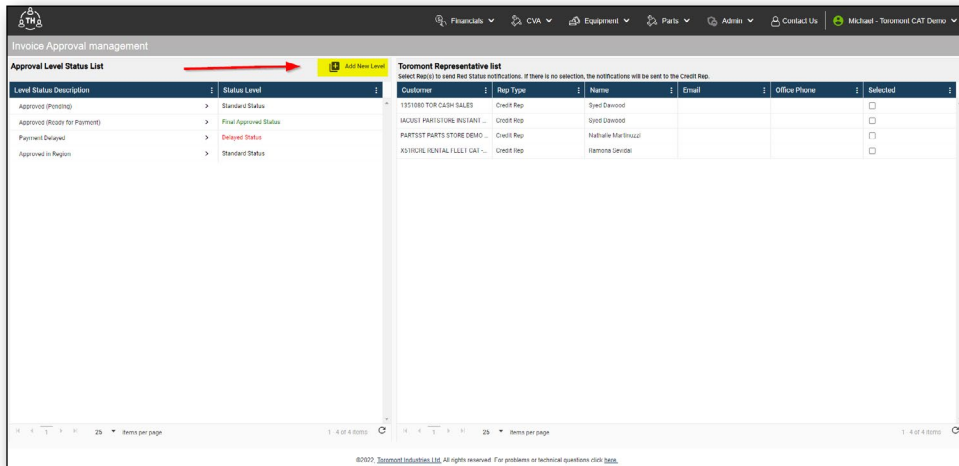
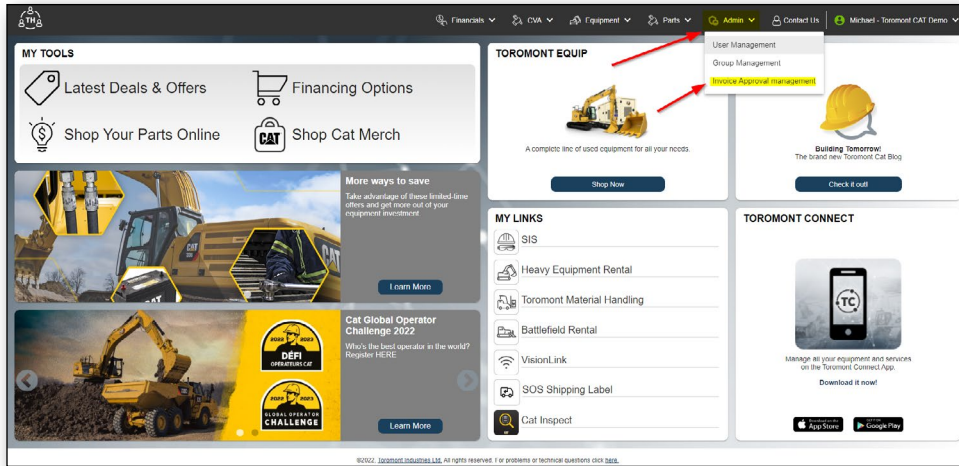
QTY	PART NUMBER	DESCRIPTION	STK	EX	UNIT PRICE	EXTENSION
1	420-8944	CONNECTION-W	30	000	58.16	58.16
1	883-6830	COVER-HEAD	30	000	273.42	273.42
1	280-8397	GUARD-BELT	30	000	90.26	90.26
TOTAL PARTS						416.82
ONTARIO HST 13%						54.19

GETTING YOUR CAT PARTS JUST GOT EASIER!!
PLEASE VISIT PARTS.CAT.COM TO FIND OUT HOW!

2.9.2 STATUSES

From the “Admin” menu:

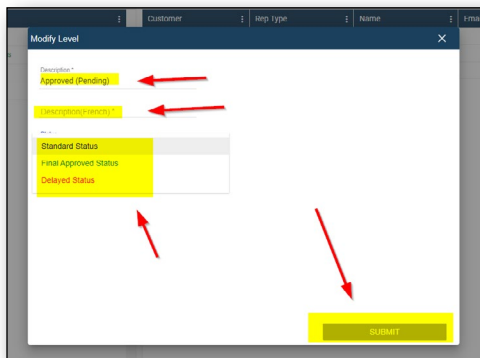
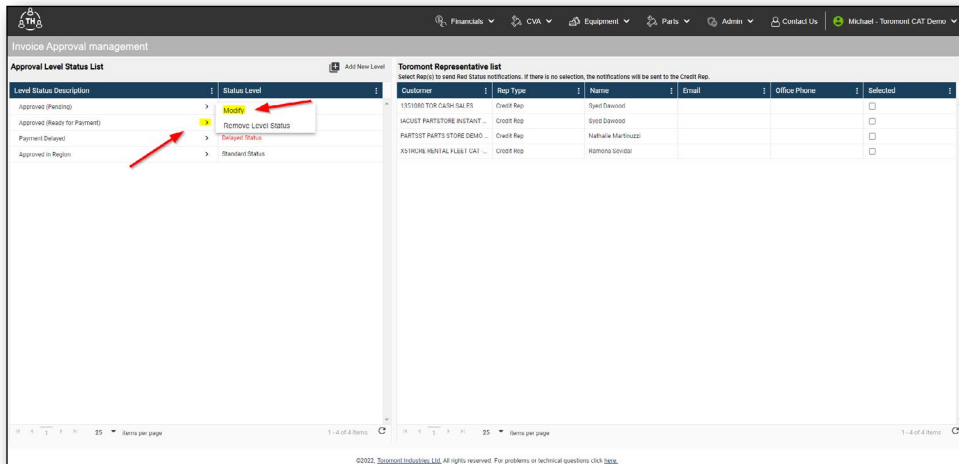
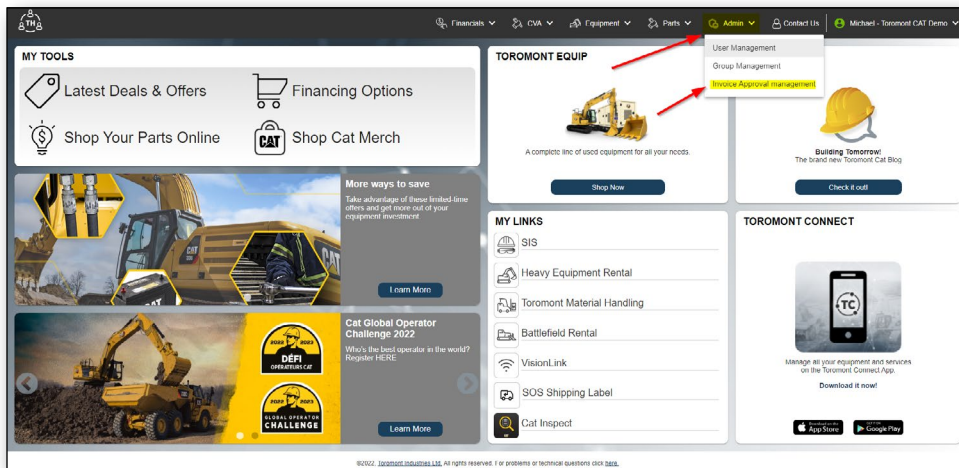
- › Select “Invoice Approval Management”
- › Select “Add New Level” in the middle
- › Provide the description in English and French
- › Select the status
- › Click “Submit”



2.9.3 MODIFY STATUSES

From the “Admin” menu:

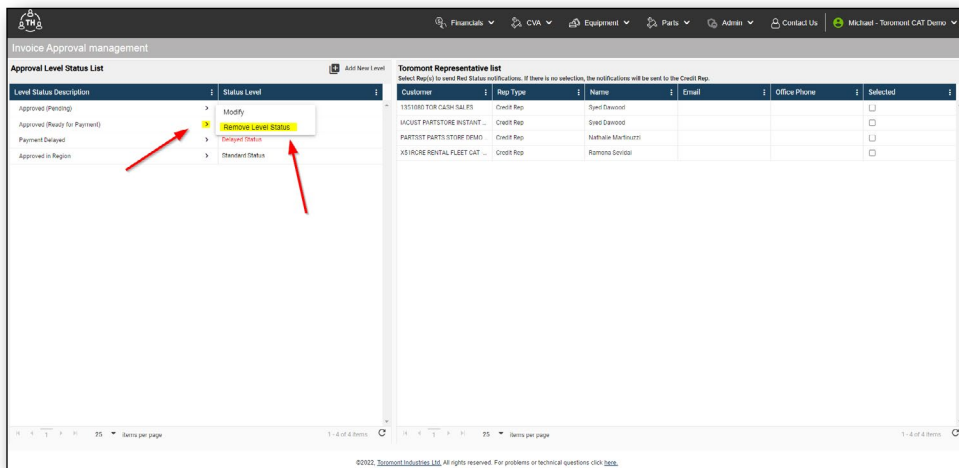
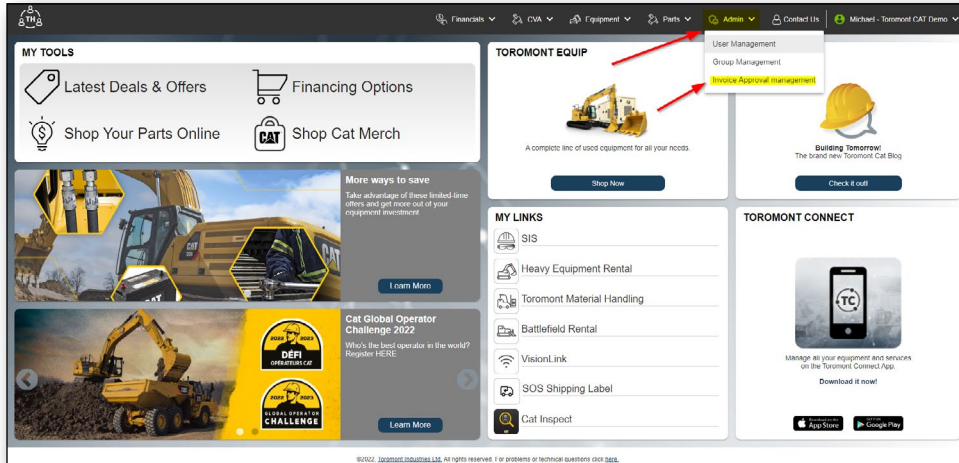
- › Select “Invoice Approval Management”
- › Select the arrow beside the level status description
- › Select “Modify”
- › Make changes to the description in English and French
- › Select the status
- › Click “Submit”



2.9.4 DELETE A STATUS

From the “Admin” menu:

- › Select “Invoice Approval Management”
- › Select the arrow beside the level status description
- › Select “Remove Level Status”
- › Select “Yes” to delete

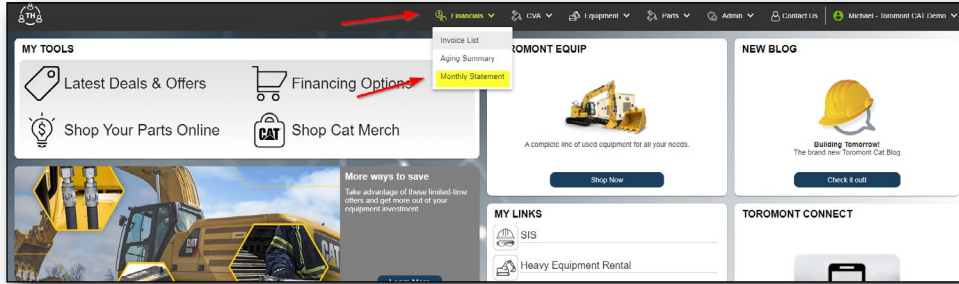


2.10 Monthly Statements

When a user selects the PDF icon, the summarized document for the selected month will be produced.

From the “Financials” menu:

- › Select monthly statement
- › Select PDF icon in the right column for the desired month



The screenshot shows the 'Monthly Statement' web application. It displays a table with columns for 'Account Number', 'Year', 'Month', and 'Statement Date'. A red arrow points to the PDF icon in the right column for the month of June 2022.

Account Number	Year	Month	Statement Date
1351000	2022	Jan	05/05/2022
1351000	2022	Feb	03/02/2022
1351000	2022	Mar	04/02/2022
1351000	2022	Apr	05/05/2022
1351000	2022	May	06/01/2022
1351000	2022	Jun	07/04/2022
1351000	2022	Jul	08/05/2022
1351000	2022	Jan	02/02/2022
1351000	2022	Feb	03/02/2022
1351000	2022	Mar	04/02/2022
1351000	2022	Apr	05/02/2022
1351000	2022	May	06/01/2022

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IMPORTANT! FOR ANY QUESTIONS PERTAINING TO THIS STATEMENT DON'T HESITATE TO CONTACT YOUR CREDIT REPRESENTATIVE TO ENSURE PROPER CREDIT TO YOUR ACCOUNT. PLEASE DETACH AND RETURN THIS STATE WITH YOUR PAYMENT.

NAME: [REDACTED] PLEASE REFER TO THIS NUMBER FOR ALL INQUIRIES: [REDACTED]

COMPANY NAME: [REDACTED] COLLECTED BY: [REDACTED]

PHONE NO: [REDACTED]

ON: [REDACTED]

CUSTOMER STATEMENT

PAGE 1 of 1 PAGES

INVOICE DATE	INVOICE NUMBER	REFERENCE	INVOICE AMOUNT	BALANCE
12.11.21	PS002353930	00C022065	35.84	35.84
23.12.21	PS002367339	00C052133	288.18	324.02
06.01.22	PS002368725	00C055191	14.39	339.01
15.01.22	PS00311700	0PC188202	115.83	454.84
11.01.22	PS003184147	0B0074787	101.844	454.00
10.03.22	PS002384475	00C091388	647.46	1,071.46
10.03.22	PS002384479	85R003387	10.42	1,040.84
11.03.22	PS002384839	00C093389A	204.72	1,215.56
26.03.22	W0001154791	T003419	272.57	1,588.13
06.04.22	PS002391576	00R105996	2,359.29	771.14
09.04.22	PS002392726	00C10982A	172.52	598.62
22.04.22	PS002395876	00C116966	376.97	221.67
23.04.22	PS002396202	00C110000	24.49	197.18
25.04.22	RD08123229	V3011/03C6	68.84	266.02
03.05.22	PS002398363	0PC220226	80.66	185.96
04.05.22	RD013011615	33740 - ST	79.68	265.66
17.05.22	PS002402033	00C131089	28.25	237.39
03.06.22	RD08123700	V2103/700	2,000.00	2,237.39
03.06.22	RD08123525	V1436 700	311.28	2,448.97
13.06.22	RD081235990	V2111 700	9,800.00	9,448.97
16.06.22	RD08123613	M4331/700	2,000.00	11,348.97
17.06.22	PS002410581	00C151105	13.24	11,335.73
17.06.22	RD08123624	V4013 700	2,000.00	13,335.73
23.06.22	PS002413039	00R197550	1,103.22	14,438.95
28.06.22	W0001160352	CT08230	872.70	13,566.25
29.06.22	PS002413871	00C198057	1,133.54	12,432.71
29.06.22	RD015011690	TI-290622-	70.88	12,503.59
29.06.22	RD08123700	D1454	23.26	12,526.85
30.06.22	PS002414755	00C159697	55.95	12,470.90
30.06.22	PS002414764	00C160267	188.68	12,272.22
30.06.22	PS002414765	00C160274	1,338.63	10,933.59
30.06.22	RH08123711	U3758 00C1	371.42	10,562.17
30.06.22	RH08123712	V0650	852.04	11,414.21

PLEASE MAKE YOUR PAYMENT TO: TOROMONT Industries
 3131 HIGHWAY 7 WEST, P.O. BOX 5511, CONCORD ON L4K 1B7
 8PM and before your payment is received at our financial institution.
 Late payments will incur a 1.5% penalty fee. (10% Penalty) will be charged on all past due amounts.

CREDIT 11,414.21-

MONTH	AMOUNT	PERCENT	TOTAL	AMOUNT	PERCENT	TOTAL
13,331.84	2,509.32	100.00	1,795.31	1,164.33	0.50	521.00



3 List Function

3.1 Invoice Lookup – Search

From the Home screen:

- › Select “Invoice List” from the “Financials” menu
- › Select blank white space under the column header “Invoice Number”
- › Type invoice number

Division	Invoice Number	Invoice Date	Invoice Type	Amount	Account No.	PO Number	Description	Serial#	Equipment Number	Status	Approval Level
GM	F500242995	08/06/2022	Parts	\$380.00	1091000		OTLAN LEA/HWOOD	000179820A		Unpaid	Not Processed
GM	F500242996	08/06/2022	Parts	\$341.44	1091000		QUOTE	000180231		Unpaid	Not Processed
GM	F500242997	08/06/2022	Parts	\$1,143.33	1091000		JAMES	000180232A	00037559	Unpaid	Not Processed
GM	F500242998	08/06/2022	Parts	\$2,582.37	1091000		PAYMENT PORTAL	000180466	004E00174	Unpaid	Not Processed
GM	F500242999	08/06/2022	Parts	\$700.00	1091000		LAN	000180766		Unpaid	Not Processed
GM	F500242970	08/06/2022	Parts	\$143.61	1091000		PAYMENT PORTAL	000180917	00032050	Unpaid	Not Processed
GM	F500242971	08/06/2022	Parts	\$70.97	1091000		JACUST	000181048		Unpaid	Not Processed
GM	F500242972	08/06/2022	Parts	\$316.14	1091000		ANYOND	000181123		Unpaid	Not Processed
GM	F500242980	08/06/2022	Parts	\$274.70	1091000		JACUST	AA0022899		Unpaid	Not Processed
GM	F500242988	08/06/2022	Parts	\$79.61	1091000		JACUST	000180563		Unpaid	Not Processed
GM	F500242979	08/06/2022	Parts	\$45.50	1091000		DEWAS	000179875A		Paid	Not Processed
GM	F500242986	08/06/2022	Parts	\$306.37	1091000		JAKE ELPB19	000179044A		Paid	Not Processed
GM	F500242991	08/06/2022	Parts	\$79.61	1091000		DON	000179054A		Unpaid	Not Processed
GM	F500242992	08/06/2022	Parts	\$144.75	1091000		AJCI	000179006		Paid	Not Processed
GM	F500242993	08/06/2022	Parts	\$341.87	1091000		SHINO	000179699	017967171	Paid	Not Processed
GM	F500242994	08/06/2022	Parts	\$76.40	1091000		STEVE	000180044		Unpaid	Not Processed
GM	F500242995	08/06/2022	Parts	\$100.21	1091000		SURH	000180048		Unpaid	Not Processed
GM	F500242996	08/06/2022	Parts	\$52.43	1091000		MANPREET	000180072		Unpaid	Not Processed
GM	F500242987	08/06/2022	Parts	\$240.03	1091000		ENDZ	000180101	0FTW03416	Unpaid	Not Processed

Division	Invoice Number	Invoice Date	Invoice Type	Has Parking Slip	Amount	Account No.	PO Number	Description	Serial#	Equipment Number	Status	Approval Level
GM	F500242995	08/13/2022	Parts	Yes	\$95.35			PETER	000184878		Unpaid	Not Processed

3.2 Invoice Types - Filter

From the Home screen:

- › Select “Invoice Look Up” from the “Financials” menu
- › Select white area beneath invoice type filter header
- › Select desired invoice types

The screenshot shows the 'Invoice Lookup' window with the 'Invoice Type' column highlighted in yellow. A red arrow points to the filter header area. The table contains the following data:

Division	Invoice Number	Invoice Date	Invoice Type	Amount	Account No.	PO Number	Description	Serial#	Equipment Number	Status	Approval Level
CAI	F5002429565	08/09/2022	Parts	\$268.08	1301080		DYLAN LEATHWOOD	00C179023A		Unpaid	Not Processed
CAI	F5002429564	08/09/2022	Parts	\$841.44	1301080		ODITE	00C1802051		Unpaid	Not Processed
CAT	F5002429597	08/09/2022	Parts	\$1,643.33	1301080		JAMES	00C180202A	08AX75558	Unpaid	Not Processed
CAT	F5002429598	08/09/2022	Parts	\$2,388.27	1301080		PAYMENT PORTAL	00C180486	08A820174	Unpaid	Not Processed
CAT	F5002429599	08/09/2022	Parts	\$709.02	1301080		IAN	00C180786		Unpaid	Not Processed
CAT	F500242970	08/09/2022	Parts	\$943.81	1301080		PAYMENT PORTAL	00C180917	08AX30552	Unpaid	Not Processed
CAT	F5002429971	08/09/2022	Parts	\$72.27	1301080		J&L JLT	00C181048		Unpaid	Not Processed
CAI	F5002429879	08/09/2022	Parts	\$216.14	1301080		ANTONIO	00C181122		Unpaid	Not Processed
CAI	F5002429548	08/09/2022	Parts	\$214.70	1301080		J&L JLT	AMC022395		Unpaid	Not Processed
CAT	F5002429558	08/09/2022	Parts	(\$291.61)	1301080		J&L JLT	08R19563		Unpaid	Not Processed
CAT	F5002429579	08/09/2022	Parts	\$45.56	1301080		DENNIS	00C178975A		Paid	Not Processed
CAT	F5002429380	08/09/2022	Parts	\$306.27	1301080		J&L EMP#119	00C179094A		Paid	Not Processed
CAT	F5002423381	08/09/2022	Parts	\$231.85	1301080		DON	00C179095A		Unpaid	Not Processed
CAT	F5002423382	08/09/2022	Parts	\$244.76	1301080		AXEL	00C179060		Paid	Not Processed

The screenshot shows the 'Invoice Lookup' window with the 'Invoice Type' column dropdown menu open. The menu options are: Statement, Rental, Parts, Work Order, and Misc. A red arrow points to the dropdown menu. The table contains the following data:

Division	Invoice Number	Invoice Date	Invoice Type	Amount	Account No.	PO Number	Description	Serial#	Equipment Number	Status	Approval Level
CAI	F5002429565	08/09/2022	Parts	\$268.08	1301080		DYLAN LEATHWOOD	00C179023A		Unpaid	Not Processed
CAI	F5002429564	08/09/2022	Parts	\$841.44	1301080		ODITE	00C1802051		Unpaid	Not Processed
CAT	F5002429597	08/09/2022	Parts	\$1,643.33	1301080		JAMES	00C180202A	08AX75558	Unpaid	Not Processed
CAT	F5002429598	08/09/2022	Parts	\$2,388.27	1301080		PAYMENT PORTAL	00C180486	08A820174	Unpaid	Not Processed
CAT	F5002429599	08/09/2022	Parts	\$709.02	1301080		IAN	00C180786		Unpaid	Not Processed
CAT	F500242970	08/09/2022	Parts	\$943.81	1301080		PAYMENT PORTAL	00C180917	08AX30552	Unpaid	Not Processed
CAT	F5002429971	08/09/2022	Parts	\$72.27	1301080		J&L JLT	00C181048		Unpaid	Not Processed
CAI	F5002429879	08/09/2022	Parts	\$216.14	1301080		ANTONIO	00C181122		Unpaid	Not Processed
CAI	F5002429548	08/09/2022	Parts	\$214.70	1301080		J&L JLT	AMC022395		Unpaid	Not Processed
CAT	F5002429558	08/09/2022	Parts	(\$291.61)	1301080		J&L JLT	08R19563		Unpaid	Not Processed
CAT	F5002429579	08/09/2022	Parts	\$45.56	1301080		DENNIS	00C178975A		Paid	Not Processed
CAT	F5002429380	08/09/2022	Parts	\$306.27	1301080		J&L EMP#119	00C179094A		Paid	Not Processed
CAT	F5002423381	08/09/2022	Parts	\$231.85	1301080		DON	00C179095A		Unpaid	Not Processed
CAT	F5002423382	08/09/2022	Parts	\$244.76	1301080		AXEL	00C179060		Paid	Not Processed

3.3 Invoice Lookup - hide columns

From the Home screen:

- › Select “Invoice Look Up” from the “Financials” menu
- › Select 3 dots in column headers
- › Select “Columns”
- › Unselect undesired sections

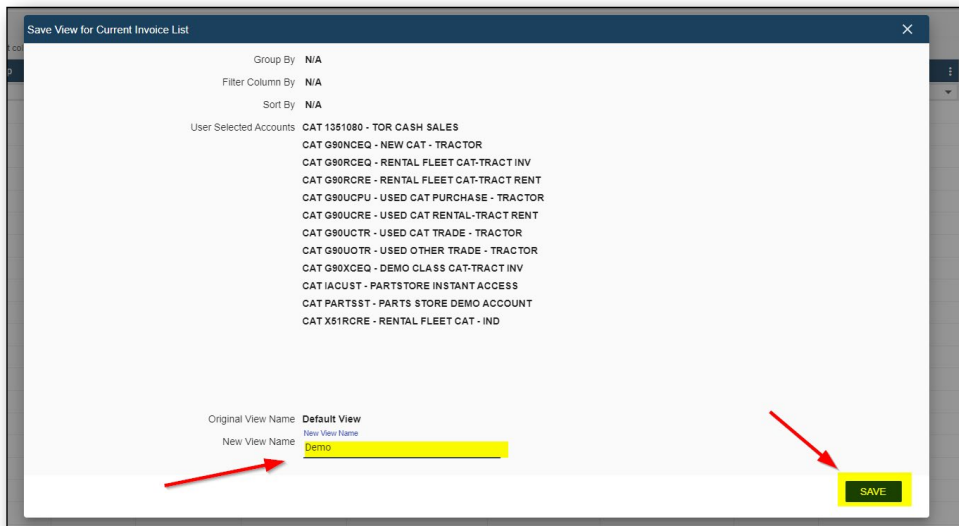
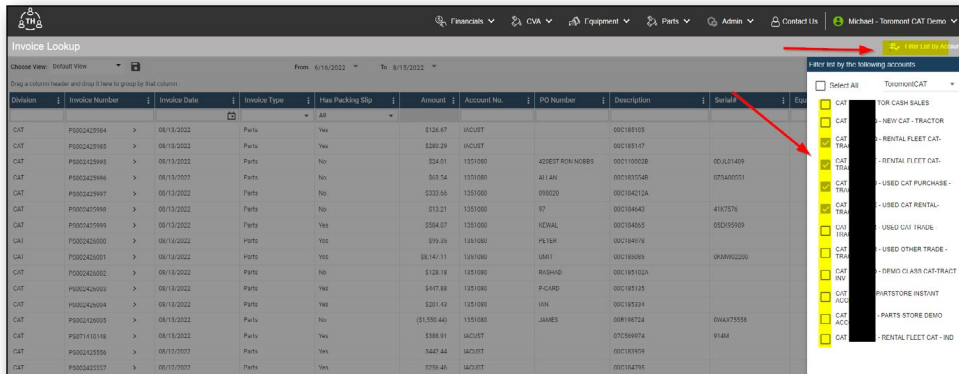
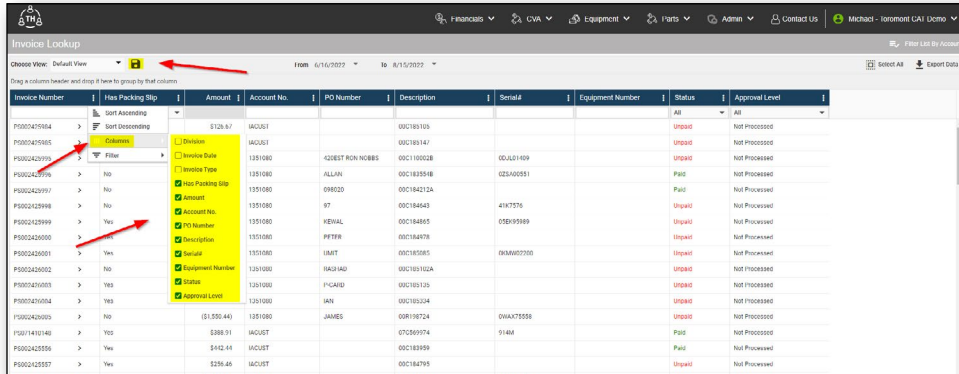
The screenshot shows the 'Invoice Lookup' window with the 'Columns' dropdown menu open. The menu options are: Division, Invoice Date, Invoice Type, Amount, Account No., PO Number, Description, Serial#, Equipment Number, Status, and Approval Level. A red arrow points to the dropdown menu. The table contains the following data:

Division	Invoice Number	Invoice Date	Invoice Type	Amount	Account No.	PO Number	Description	Serial#	Equipment Number	Status	Approval Level
CAI	F5002429565	08/09/2022	Parts	\$268.08	1301080		DYLAN LEATHWOOD	00C179023A		Unpaid	Not Processed
CAI	F5002429564	08/09/2022	Parts	\$841.44	1301080		ODITE	00C1802051		Unpaid	Not Processed
CAI	F5002429597	08/09/2022	Parts	\$1,643.33	1301080		JAMES	00C180202A	08AX75558	Unpaid	Not Processed
CAI	F5002429598	08/09/2022	Parts	\$2,388.27	1301080		PAYMENT PORTAL	00C180486	08A820174	Unpaid	Not Processed
CAT	F5002429599	08/09/2022	Parts	\$709.02	1301080		IAN	00C180786		Unpaid	Not Processed
CAT	F500242970	08/09/2022	Parts	\$943.81	1301080		PAYMENT PORTAL	00C180917	08AX30552	Unpaid	Not Processed
CAT	F5002429971	08/09/2022	Parts	\$72.27	1301080		J&L JLT	00C181048		Unpaid	Not Processed
CAT	F5002429879	08/09/2022	Parts	\$216.14	1301080		ANTONIO	00C181122		Unpaid	Not Processed
CAI	F5002429548	08/09/2022	Parts	\$214.70	1301080		J&L JLT	AMC022395		Unpaid	Not Processed
CAI	F5002429558	08/09/2022	Parts	(\$291.61)	1301080		J&L JLT	08R19563		Unpaid	Not Processed
CAI	F5002429579	08/09/2022	Parts	\$45.56	1301080		DENNIS	00C178975A		Paid	Not Processed
CAI	F5002429380	08/09/2022	Parts	\$306.27	1301080		J&L EMP#119	00C179094A		Paid	Not Processed
CAI	F5002423381	08/09/2022	Parts	\$231.85	1301080		DON	00C179095A		Unpaid	Not Processed
CAI	F5002423382	08/09/2022	Parts	\$244.76	1301080		AXEL	00C179060		Paid	Not Processed

3.4 Invoice Lookup - Save View

From the Home screen:

- › Select “Invoice Look Up” from the “Financials” menu
- › Select 3 dots in column headers
- › Select “Columns”
- › Unselect undesired sections
- › Select “Filter List By Account” to select/unselect any accounts
- › Select “Save” icon in top left corner
- › Input list view name at the bottom
- › Select “Save”

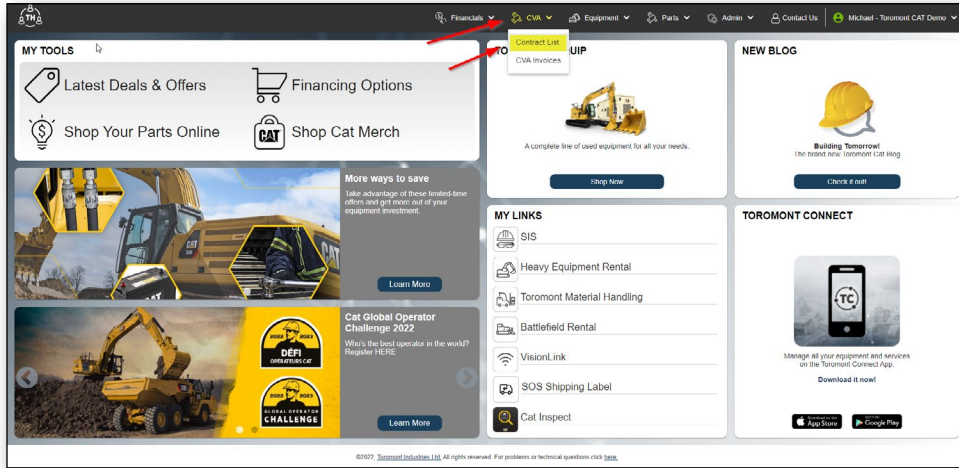




4 Customer Value Agreement (CVA)

4.1 View Equipment List

› From the “CVA” menu, select “Contract List”



Contract List

Choose View: Default View

Export Data

Enrollment Number	Equipment Number	Customer #	Location	Model	Serial#	Start Date	End Date	Ending hours	Remaining hours	TMSR	Utilization
09020270	>	024680		428EL	0M1001121	08/09/2022	08/09/2022	2005	2005		
09020280	>	0232	060780	060E	0M4001130	07/22/2022	07/22/2024	2001	1988	5.66	14.46
09020282	>	0628	060780	0918-88	0M8002077	06/30/2022	06/30/2023	2001	1996	1.97	2.41
09020288	>		060780	0958	0P9001041	05/27/2022	05/27/2024	2001	1679	1.73	138.4
09020292	>		060780	0958-MN	0P5001042	05/27/2022	05/27/2024	2001	1687	1.73	135.2
09020313	>	284	060780	3254T	0C2002025	07/09/2021	07/09/2025	6013	4688	1.66	80.74
09020301	>	0330	060780	979E	0M6004028	06/02/2021	06/02/2025	21007	19050	40.79	110.86
09020303	>	0613	060780	9088-88	010023603	05/11/2021	05/11/2024	3001	504	4.73	199.68
09020304	>	0715	060780	74E	037602775	05/06/2021	05/06/2025	6007	4376	2.12	86.67
09020307	>	0718	060780	74E	037602776	05/09/2021	05/09/2023	8009	4358	2.12	77.07
09020307	>	0717	060780	74E	037602777	05/09/2021	05/09/2023	8008	4619	2.12	73.85
09020307	>	0620	060780	060E	0M8003063	04/26/2021	04/26/2023	8009	3885	1.46	109.79
09020308	>	0327	060780	03	0X0003072	04/19/2021	04/19/2023	6005	4849	1.02	57.55
09020309	>	0328	060780	060E	0M8003062	04/16/2021	04/16/2023	6011	4103	1.46	94.85
09020309	>	0326	060780	979E	0M6004039	08/03/2020	08/03/2024	21003	17910	36.33	103
09020306	>	0279	060780	348P	0M8003074	06/11/2019	06/11/2023	6005	1631	2.88	91.98
09020301	>	0323	060780	979E	0M6003051	05/22/2019	05/22/2023	21005	16682	39.01	88.97
09020303	>	0330	060780	079E	0M6003016	07/10/2018	07/10/2020	21035	14088	40.11	99.62
09020304	>	0319	060780	0750	010903474	04/24/2017	04/24/2021	21005	13006	37.05	93.67

25 Items per page

1 - 27 of 27 Items

4.2 CVA - View Equipment Repair History

In the “CVA” section:

- › Search equipment by serial number or equipment number or enrollment number
- › Select arrow beside enrollment number
- › Select “Repair History”

Enrollment Number	Equipment Number	Customer #	Location	Model	Serial#	Start Date	End Date	Ending Hours	Remaining hours	TMR	Utilization
SU021P289	35	0806CTR		425M	0W6503719	11/01/2019	11/01/2023	1373	835	7.84	44
CONTRP266		0806CCO		3560	00SF10154	12/22/2020	12/22/2023	5032	4101	3.07	32.37

4.3 CVA - View Contract Invoices

- › From the “CVA” menu, select “CVA Invoices”

Division	Invoice Number	Invoice Date	Invoice Type	Has Packing Slip	Amount	Account No.	PO Number	Description	Serial#	Equipment Number	Status
CAT	W090887220	07/28/2022		No	\$1,822.16	090NCEQ		MAINT CONTRACT			Unpaid
CAT	W0908876005	05/02/2022		No	(\$11,000.00)	090NCEQ		INTERNAL			Unpaid
CAT	W0908873771	04/29/2022		No	\$13,000.00	090NCEQ		INTERNAL			Unpaid
CAT	W0908842534	03/11/2022		No	\$4,617.00	090NCEQ		INTERNAL CHANGE			Unpaid
CAT	W0908855656	07/08/2021		No	\$3,794.44	090NCAJ					Unpaid
CAT	W0908817191	12/21/2020		No	\$3,000.00	090NCAJ		MARKED			Unpaid
CAT	W0908809556	12/02/2020		No	\$1,000.00	090NCAJ		MAINT CONTRACT			Unpaid
CAT	W0908893939	04/20/2020		No	\$6,000.00	090NCEQ					Unpaid
CAT	W0908784616	08/25/2016		No	\$26,193.55	090NCEQ					Unpaid
CAT	W0908948607	06/07/2016		No	\$48.70	090UCTR		MAINTENANCE CONTR.		320CLR8	Unpaid
CAT	W0908942174	06/06/2016		No	\$206.34	090UCTR		MAINT CONTRACT		E401	Unpaid
CAT	W0908893744	07/11/2014		No	\$4,500.00	090NCEQ					Unpaid
CAT	W0906050157	01/17/2014		No	\$426.42	090UCTR		MAINTENANCE CONTR.			Unpaid
CAT	W0906038937	05/01/2013		No	\$10,441.55	090NCCO		MAINT CONTRACT			Unpaid
CAT	W0906013946	10/19/2009		No	\$5,667.76	090NCEQ		PAUL GAVIN - INT2870			Unpaid
CAT	W0906009226	08/15/2008		No	\$819.10	090NCEQ		CSA			Unpaid
CAT	W0906009075	07/29/2008		No	\$1,184.30	090NCEQ		MAINTENANCE CONTR.			Unpaid



5 Equipment List

5.1 Equipment – View Fleet

- › From the “Equipment” menu, select “Equipment List”

Connected	Serial #	Customer #	Make	Model	Unit #	Hours	Year	Date Purchased	Last WO	Last Known Location	Last Known Date
	P56 WINCH 01	1351080	CATERPILLAR (SEE AA)	D4D							
	000001	1351080	METSO MINERALS	HP4						TOR_ToromontCAT Branch 00 - Congo	12/21/2017
	0000217233	1351080	TRIMBLE PRODUCTS	SURVEY CTR							
	0000217245	1351080	TRIMBLE PRODUCTS	SURVEY CTR							
	00005100	1351080	DOOSAN INFRACORP AMERICA	DX140LCR			2009	10/20/2014			
	000097	1351080	H I H MANUFACTURING	430P							
	00017345	1351080	UNANOVIN	740B							
	00012345-1	1351080	UNANOVIN	740B							
	00012345-2	1351080	UNANOVIN	740B							
	00019198	1351080	CATERPILLAR	420F2T							
	000560	1351080	JOHN DEERE	744P		3176	1999	12/22/2014		TOR_ToromontCAT Branch 00 - Congo	10/03/2014
	00050492A	1351080	CATERPILLAR	420D							
	00100044	1351080	CATERPILLAR	330DL						TOR_ToromontCAT Branch 00 - Congo	09/08/2015
	00100010	1351080	CATERPILLAR	314					26/13/2020		
	00101044	1351080	CATERPILLAR	339						U&M_ToromontCAT Branch 02 - Jijona	11/16/2016
	00145150	1351080	CATERPILLAR	AP550C						U&M_ToromontCAT Branch 02 - Jijona	09/07/2015
	00182910	1351080	CATERPILLAR	AP550C						U&M_ToromontCAT Branch 02 - Jijona	07/21/2016

5.2 Equipment – Add Equipment

On the “Equipment List” screen:

- › Select “Add Equipment” in top right corner
- › Select specific customer number
- › Fill in equipment information, as well as any notes

Connected	Serial #	Customer #	Make	Model	Unit #	Hours	Year	Date Purchased	Last WO	Last Known Location	Last Known Date
	P56 WINCH 01	1351080	CATERPILLAR (SEE AA)	D4D							
	000001	1351080	METSO MINERALS	HP4						TOR_ToromontCAT Branch 00 - Congo	12/21/2017
	0000217233	1351080	TRIMBLE PRODUCTS	SURVEY CTR							
	0000217245	1351080	TRIMBLE PRODUCTS	SURVEY CTR							
	00005100	1351080	DOOSAN INFRACORP AMERICA	DX140LCR			2009	10/20/2014			
	000097	1351080	H I H MANUFACTURING	430P							
	00012345	1351080	UNANOVIN	740B							
	00017345-1	1351080	UNANOVIN	740B							
	00017345-2	1351080	UNANOVIN	740B							
	00018198	1351080	CATERPILLAR	420F2T							
	000500	1351080	JOHN DEERE	744E		3176	1999	12/22/2014		TOR_ToromontCAT Branch 00 - Congo	10/03/2014
	00050492A	1351080	CATERPILLAR	420D							
	00100044	1351080	CATERPILLAR	330DL						TOR_ToromontCAT Branch 00 - Congo	09/08/2015
	00100010	1351080	CATERPILLAR	314					26/13/2020		
	00101044	1351080	CATERPILLAR	339						U&M_ToromontCAT Branch 02 - Jijona	11/16/2016
	00145150	1351080	CATERPILLAR	AP550C						U&M_ToromontCAT Branch 02 - Jijona	09/07/2015
	00182910	1351080	CATERPILLAR	AP550C						U&M_ToromontCAT Branch 02 - Jijona	07/21/2016

Add Equipment

Please Note: All changes submitted on this screen to Toromont administrators before being completed. Changes to equipment details will NOT be reflected immediately (usually within 1 - 2 business days). Thanks for your patience.

Customer Number: 1351080 - TOR CASH SALES

Make: [Dropdown]

Model: [Text]

Unit #: [Text]

Serial Number: [Text]

Service Meter: [Text]

Equipment Year: 2022

Date Purchased: [Text]

Note: [Text Area]

[CANCEL] [ADD TO EQUIPMENT LIST]

5.3 Equipment – Modify Equipment Details

When a user modifies their equipment, the request will be logged in the sub-section “Equipment Request” until it is either approved or denied by Toromont.

On the “Equipment List” screen:

- › Select arrow beside the serial # of desired piece of equipment
- › Select “Modify”
- › Update any fields
- › Select “Request Update” button
- › To review Equipment Requests, select “Equipment Requests” from the “Equipment” menu

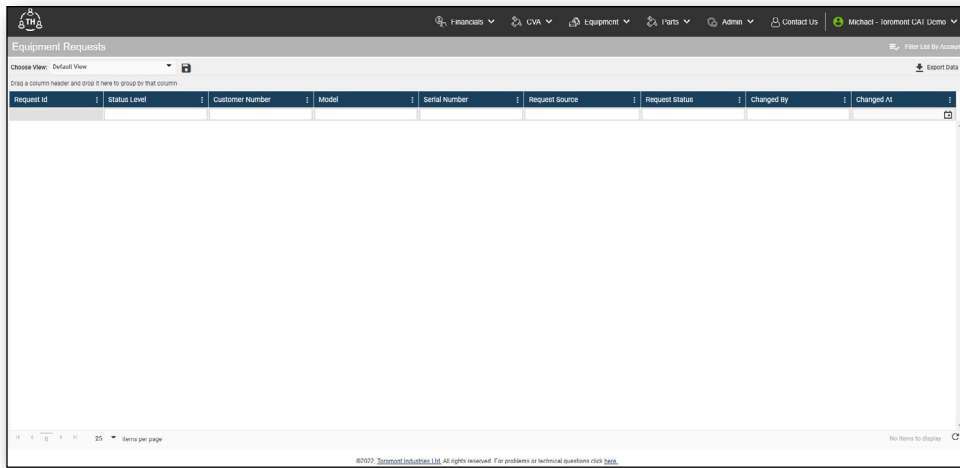
The screenshot shows the 'Equipment List' interface. A table lists various pieces of equipment with columns for Connected, Serial #, Customer #, Make, Model, Unit #, Hours, Year, Date Purchased, Last WO, Last Known Location, and Last Known Date. A context menu is open over the 'Modify' option for the equipment with Serial # 0010064.

Connected	Serial #	Customer #	Make	Model	Unit #	Hours	Year	Date Purchased	Last WO	Last Known Location	Last Known Date
	456 WNCB 01	1251080	CATERPILLAR (SEE AA)	D40							
	000001	1251080	METSO MINERALS	HP4						TOR - ToromontCAT Branch 00 - Congo	12/21/2017
	0000217223	1251080	TRIMBLE PRODUCTS	SURVEY CTR							
	0000217245	1251080	TRIMBLE PRODUCTS	SURVEY CTR							
	00005100	1251080	DOOSAN INFRACORE AMERICA	DX140LCR			2009	10/20/2014			
	000097	1251080	H & H MANUFACTURING	420F							
	00012345	1251080	UNKNOWN	740B							
	00012345-1	1251080	UNKNOWN	740B							
	00012345-2	1251080	UNKNOWN	740B							
	000198188	1251080	CATERPILLAR	42D2P21							
	000500	1251080	JOHN DEERE	744E		9176	1999	12/22/2014		TOR - ToromontCAT Branch 00 - Congo	10/03/2014
	00050002A	1251080	CATERPILLAR	42D2							
	0010064	1251080	CATERPILLAR	330D						TOR - ToromontCAT Branch 00 - Congo	09/08/2015
	0010064	1251080	CATERPILLAR	330D						26/3/2010	
	0010064	1251080	CATERPILLAR	330						HAM - ToromontCAT Branch 02 - Haiti	11/18/2016
	0010064	1251080	CATERPILLAR	49F72B						HAM - ToromontCAT Branch 02 - Haiti	09/02/2015
	00182916	1251080	CATERPILLAR	49F72B						HAM - ToromontCAT Branch 02 - Haiti	07/21/2016
	00198306V19767	1251080	TRANSCORE	MT2000							
	00198317V19420E	1251080	TRANSCORE	MT2000							

The screenshot shows the 'Update Equipment' form. The form is highlighted in yellow. It contains fields for Model (330D), Make Code (AA), and Serial Number (0010064). There are also fields for Customer #, Unit #, Service Meter Date, Equipment Year, and Date Purchased. A 'REQUEST UPDATE' button is highlighted with a red arrow.

The screenshot shows the 'Equipment List' interface. A red arrow points to the 'Equipment Request' button in the top navigation bar. The table below shows the same list of equipment as in the first screenshot.

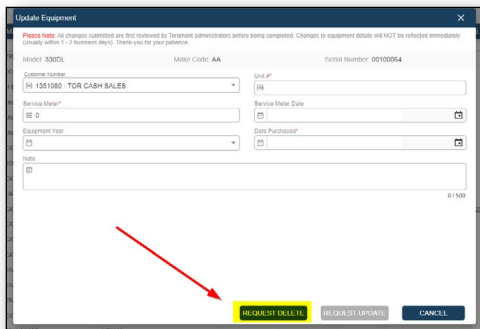
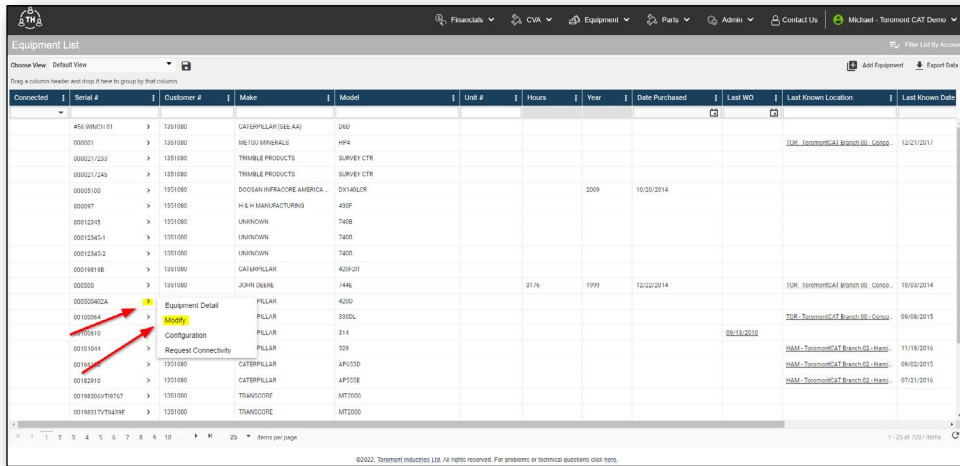
Connected	Serial #	Customer #	Make	Model	Unit #	Hours	Year	Date Purchased	Last WO	Last Known Location	Last Known Date
	456 WNCB 01	1251080	CATERPILLAR (SEE AA)	D40							
	000001	1251080	METSO MINERALS	HP4						TOR - ToromontCAT Branch 00 - Congo	12/21/2017
	0000217233	1251080	TRIMBLE PRODUCTS	SURVEY CTR							
	0000217245	1251080	TRIMBLE PRODUCTS	SURVEY CTR							
	00005100	1251080	DOOSAN INFRACORE AMERICA	DX140LCR			2009	10/20/2014			
	000097	1251080	H & H MANUFACTURING	420F							
	00012345	1251080	UNKNOWN	740B							
	00012345-1	1251080	UNKNOWN	740B							
	00012345-2	1251080	UNKNOWN	740B							
	000198188	1251080	CATERPILLAR	42D2P21							
	000500	1251080	JOHN DEERE	744E		9176	1999	12/22/2014		TOR - ToromontCAT Branch 00 - Congo	10/03/2014
	00050002A	1251080	CATERPILLAR	42D2							
	0010064	1251080	CATERPILLAR	330D						TOR - ToromontCAT Branch 00 - Congo	09/08/2015
	0010064	1251080	CATERPILLAR	330						26/3/2010	
	0010064	1251080	CATERPILLAR	329						HAM - ToromontCAT Branch 02 - Haiti	11/18/2016
	0010064	1251080	CATERPILLAR	49F50E						HAM - ToromontCAT Branch 02 - Haiti	09/02/2015
	001022910	1251080	CATERPILLAR	49F50E						HAM - ToromontCAT Branch 02 - Haiti	07/21/2016
	00198306V19767	1251080	TRANSCORE	MT2000							
	00198317V19420E	1251080	TRANSCORE	MT2000							



5.4 Equipment - Delete

On the “Equipment List” screen:

- › Select arrow beside serial # of desired piece of equipment
- › Select “Modify”
- › Select “Request Delete”



5.5 Equipment – View SMU (Service Meter Unit)

On the “Equipment List” screen:

- › Select arrow beside serial # of desired piece of equipment
- › Select “Equipment Detail”
- › In the section “Unit #” you will find the service meter information

Connected	Serial #	Customer #	Make	Model	LINE #	Hours	Year	Date Purchased	Last WO	Last Known Location	Last Known Date
	#56 WINCH 01	1351080	CATERPILLAR (SEE AA)	DA0							
	000001	1351080	METSO MINERALS	HP4						TOR - ToromontCAT Branch 00 - Conco	12/21/2017
	0000217233	1351080	TRIMBLE PRODUCTS	SURVEY CTR							
	0000217245	1351080	TRIMBLE PRODUCTS	SURVEY CTR							
	00008100	1291090	DOUGGAN INFRASTRUCTURE AMERICA	DX1482CB			2009	10/20/2014			
	000097	1291090	H & H MANUFACTURING	430P							
	00017345	1291090	UNKNOWN	740B							
	0001245-1	1351080	UNKNOWN	740B							
	0001245-2	1351080	UNKNOWN	740B							
	000198198	1351080	CATERPILLAR	420P2T							
	000000	1351080	JOHAN DEERE	744E		3175	1999	12/22/2014		TOR - ToromontCAT Branch 00 - Conco	10/03/2014
	000004074	1351080	PILLAR	4200						TOR - ToromontCAT Branch 00 - Conco	09/08/2015
	01100004	1351080	PILLAR	3300L						TOR - ToromontCAT Branch 00 - Conco	09/08/2015
	01100010	1351080	PILLAR	314					2013-2010		
	01100100	1351080	PILLAR	329						HMM - ToromontCAT Branch 02 - HMM	11/18/2016
	01100100	1351080	CATERPILLAR	AP950D						HMM - ToromontCAT Branch 02 - HMM	09/02/2015
	01102210	1351080	CATERPILLAR	AP550E						HMM - ToromontCAT Branch 02 - HMM	07/21/2016
	00198206V19767	1351080	TRANSCORE	MT2000							
	00198217V194476	1351080	TRANSCORE	MT2000							

Customer Name: USED CAT PURCHASE - TRACTOR

Model: 800M WHEEL LOADER Make Code: AA

Make: CATERPILLAR Serial Number: KR501320

Unit #

Service Meter: 23481 Service Meter Date:

Equipment Year: 2016 Date Purchased:

Note:

CLOSE

5.6 Equipment – View Configuration

On the “Equipment List” screen:

- › Select arrow beside serial # of desired piece of equipment
- › Select “Configuration”

Connected	Serial #	Customer #	Make	Model	LINE #	Hours	Year	Date Purchased	Last WO	Last Known Location	Last Known Date
	#56 WINCH 01	1351080	CATERPILLAR (SEE AA)	DA0							
	000001	1351080	METSO MINERALS	HP4						TOR - ToromontCAT Branch 00 - Conco	12/21/2017
	0000217233	1351080	TRIMBLE PRODUCTS	SURVEY CTR							
	0000217245	1351080	TRIMBLE PRODUCTS	SURVEY CTR							
	00008100	1351080	DOUGGAN INFRASTRUCTURE AMERICA	DX1482CB			2009	10/20/2014			
	000097	1351080	H & H MANUFACTURING	430P							
	00012345	1351080	UNKNOWN	740B							
	00017345-1	1351080	UNKNOWN	740D							
	00012345-2	1351080	UNKNOWN	740D							
	000198198	1351080	CATERPILLAR	420P2T							
	000000	1351080	JOHAN DEERE	744E		3175	1999	12/22/2014		TOR - ToromontCAT Branch 00 - Conco	10/03/2014
	000004074	1351080	PILLAR	4200						TOR - ToromontCAT Branch 00 - Conco	09/08/2015
	01100004	1351080	PILLAR	3300L						TOR - ToromontCAT Branch 00 - Conco	09/08/2015
	01100010	1351080	PILLAR	314					2013-2010		
	01100100	1351080	PILLAR	329						HMM - ToromontCAT Branch 02 - HMM	11/18/2016
	01100100	1351080	CATERPILLAR	AP950D						HMM - ToromontCAT Branch 02 - HMM	09/02/2015
	01102210	1351080	CATERPILLAR	AP550E						HMM - ToromontCAT Branch 02 - HMM	07/21/2016
	00198206V19767	1351080	TRANSCORE	MT2000							
	00198217V194476	1351080	TRANSCORE	MT2000							

5.7 Equipment – Request Connectivity

On the “Equipment List” screen:

- › Select arrow beside serial # of desired piece of equipment
- › Select “Request Connectivity”
- › Select the type of connectivity desired
- › Fill required fields and select “Send” to submit request

The screenshot shows the 'Equipment List' interface. At the top, there are navigation tabs for Financials, CWI, Equipment, Parts, Admin, Contact Us, and a user profile for Michael - Toromont CAT Demo. Below the navigation is a toolbar with 'Add Equipment' and 'Export Data'. The main area contains a table with the following columns: Connected, Serial #, Customer #, Make, Model, Unit #, Hours, Year, Date Purchased, Last WO, Last Known Location, and Last Known Date. A dropdown menu is open for the 'Request Connectivity' button next to the row with Serial # 00101944. The dropdown options are 'Equipment Detail', 'Configure', and 'Request Connectivity'. The 'Request Connectivity' option is highlighted in yellow.

The screenshot shows the 'Request Connectivity' dialog box overlaid on the equipment list. The dialog box has a title bar 'Request Connectivity' and a close button. It contains two radio buttons: 'Hours & Location Only' (selected) and 'Location and all available data'. Below the radio buttons are three input fields: 'Contact Name', 'Phone', and 'Email'. There is also a text area for 'Additional info'. At the bottom of the dialog box are 'CANCEL' and 'SEND' buttons. The 'SEND' button is highlighted in yellow.

5.8 Equipment - Request Service

Allow users to request service for a piece of equipment on Toromont Hub and/or Toromont Connect. On the “Equipment List” screen:

- › Select the arrow beside the serial # of the desired piece of equipment.
 - › Select “Request Service”, select the type of service repair, fill the required fields (contact name, mobile phone number, and email address).
 - › Select “Submit” to submit your request.
- Once your request is submitted, go to the “Equipment Request” list to view the status of the repair.
 - The User who submits the service request will receive SMS notifications surrounding the appointment (ex: The technician gives the customer a heads up they are on the way!)

Connected	Serial#	Make	Model	Unit#	Hours	Year	Purchase Date	Repair History	Last Known Location	Last Known	Rental	Type	Product Comment
	06L20215A								TOR_Toromont@T.Banc	03/19/2021	No	CAT - Attachment	
	0X731087A								TOR_Toromont@T.Banc	07/29/2022	No	CAT - Attachment	
	0X732320A								TOR_Toromont@T.Banc	10/14/2022	No	CAT - Attachment	
	181420303							07/06/2021	TOR_Toromont@T.Banc	06/16/2021	No	NON-CAT - Attachment	
	1F47030AMP23697	JOHN DEERE	4700		8533	2017		11/11/2022	Site from 1300113999.A	11/28/2022	No	NON-CAT	
	2020C003204	JOHN DEERE	850K	120	2026	2021		08/13/2022	Site from 101-201.Cdn.Ce.	12/05/2022	No	NON-CAT	
	2021C0N04050	JOHN DEERE	4700			2020					No	NON-CAT	
	2021C0N06074	JOHN DEERE	3450LC	1		2021	04/21/2021				No	NON-CAT	
	2021C0N09159	HARMI	H10	1		2021	11/02/2020				No	NON-CAT	
	2021C0N11089	KUBOTA	KX180-4	1		2021					No	NON-CAT	
	2021C0C07545	AG LEADER (GPS)	H10			2021	05/12/2021				No	NON-CAT	
	2022C010190	VEVVO	EOK35SE			2022	10/12/2022				No	NON-CAT	
	2094420101	AMF ATTACHMENTS	336						TOR_Toromont@T.Banc	11/16/2020	No	NON-CAT - Attachment	
	2070170101	AMF ATTACHMENTS	330						TOR_Toromont@T.Banc	12/16/2020	No	NON-CAT - Attachment	

Request Service

Account Number: [] Customer Name: [] Model: 924 Serial Number: 06L20215A

Unit #: [] Location: []

Select a service location: []

Phone: [] Email: []

Contact Name: [] Michael Oudare Phone: [] Email: []

First Service Date: []

PO Number: []

PO Amount: []

Equipment Down: [] Quote Required: []

City/Province: []

Hours on Unit: [] Hours Unit Date: []

Select Req. []

Submit

Connected	Serial#	Make	Model	Unit#	Hours	Year	Purchase Date	Repair History	Last Known Location	Last Known	Rental	Type	Product Comment
	06L20215A	CATERPILLAR	924						TOR_Toromont@T.Banc	03/19/2021	No	CAT - Attachment	
	0X731087A	CATERPILLAR	930M						TOR_Toromont@T.Banc	07/29/2022	No	CAT - Attachment	
	0X732320A	CATERPILLAR	930M						TOR_Toromont@T.Banc	10/14/2022	No	CAT - Attachment	
	181420303	AMF ATTACHMENTS	336					07/06/2021	TOR_Toromont@T.Banc	06/16/2021	No	NON-CAT - Attachment	
	1F47030AMP23697	JOHN DEERE	4700		8533	2017		11/11/2022	Site from 1300113999.A	11/28/2022	No	NON-CAT	
	2020C003204	JOHN DEERE	850K	120	2026	2021		08/13/2022	Site from 101-201.Cdn.Ce.	12/05/2022	No	NON-CAT	
	2021C0N04050	JOHN DEERE	4700			2020					No	NON-CAT	
	2021C0N06074	JOHN DEERE	3450LC	1		2021	04/21/2021				No	NON-CAT	
	2021C0N09159	HARMI	H10	1		2021	11/02/2020				No	NON-CAT	
	2021C0N11089	KUBOTA	KX180-4	1		2021					No	NON-CAT	
	2021C0C07545	AG LEADER (GPS)	H10			2021	05/12/2021				No	NON-CAT	
	2022C010190	VEVVO	EOK35SE			2022	10/12/2022				No	NON-CAT	
	2094420101	AMF ATTACHMENTS	336						TOR_Toromont@T.Banc	11/16/2020	No	NON-CAT - Attachment	
	2070170101	AMF ATTACHMENTS	330						TOR_Toromont@T.Banc	12/16/2020	No	NON-CAT - Attachment	
	21016210101	AMF ATTACHMENTS	352						TOR_Toromont@T.Banc	02/10/2021	No	NON-CAT - Attachment	

5.9 Equipment - Service Repair Status

Under the “Equipment Request” section:

- › Select the arrow beside “request Id” of the desired piece of equipment.
- › Select “View Requests Detail”.
- › Select “View Repair Status” to access any key contacts, documents, and messages associated with the service appointment.
- › Select “close” when finished.

- The User now has the ability to view and approve/dispute quotes, proformas, inspections and documents associated with a service appointment
- Keep track of your messages between our service Schedulers or Technicians.

Request Id	Request Type	Account Number	Make	Serial Number	Source	Request Status	Changed By	Changed At
10572	Equipment Service		MIDLAND	1028	Toromont Hub	In Progress	Michael Couture	11/21/2022 10:37:18 AM
10571	Equipment Service		CATERPILLAR	02144316	Toromont Hub	In Progress	Michael Couture	11/11/2022 09:44:10 AM
10570	Equipment Service		CATERPILLAR	00R03665	Toromont Hub	In Progress	Catalin Hatmanu	11/10/2022 03:16:54 PM
10569	Equipment Service		RWF BRON	D-01-95-0112	Toromont Hub	In Progress	Catalin Hatmanu	11/10/2022 03:13:54 PM
10568	Equipment Service		CATERPILLAR	SJ000384	Toromont Connect	In Progress	Michael Couture	11/10/2022 02:20:58 PM
10567	Equipment Service		CATERPILLAR	0255013	Toromont Hub	In Progress	Michael Couture	11/10/2022 02:03:32 PM
10566	Equipment Service		RWF BRON	D-01-95-0112	Toromont Hub	In Progress	Catalin Hatmanu	11/09/2022 02:28:48 PM
10565	Equipment Service		CATERPILLAR	1L111663	Toromont Hub	In Progress	Michael Couture	11/04/2022 02:14:46 PM
10564	Equipment Service		CATERPILLAR	T480839	Toromont Hub	In Progress	Catalin Hatmanu	11/04/2022 01:43:08 PM
10563	Equipment Service		CATERPILLAR	02144316	Toromont Hub	In Progress	Michael Couture	11/04/2022 10:24:10 AM
10555	Equipment Service		CATERPILLAR	SJ000384	Toromont Connect	Created	Michael Couture	11/01/2022 11:38:34 AM
10554	Equipment Service		CATERPILLAR	SJ000384	Toromont Connect	Created	Michael Couture	10/31/2022 01:40:55 PM

Request - In Progress

Source: Toromont Hub | Request Type: Equipment Service
 Branch: Pointe-Claire | Location: 22m from 7601-7999 E.
 Pmt. Service Date: 11/22/2022 | PO Number: 124q212 | Transportation PO Amount: 1234
 Hours on Unit: 1234 | Work order type: Equipment Down

Problem Summary: Back left tire axle broke

Equipment
 Account Number: MIDLAND | Account Name: Modco | Unit #: 23040
 Make: MIDLAND | Model: SFD10 | Serial Number: 1028

Contact
 Name: Michael Couture | Email: micouture@toromont.com | Phone Number: 514-808-5505

VIEW REPAIR STATUS | **CLOSE**

Request Customer View Appointment (ID - 2112901)

REPAIR STATUS
 Repair Status: Customer Request
 Last Updated: 5 Dec 2022 15:28

EQUIPMENT
 Type: CAT 330B
 Serial #: 02144316
 Unit Id: 19014
 Appointment Id: 2112901
 Work Order No: 8621511
 Customer:

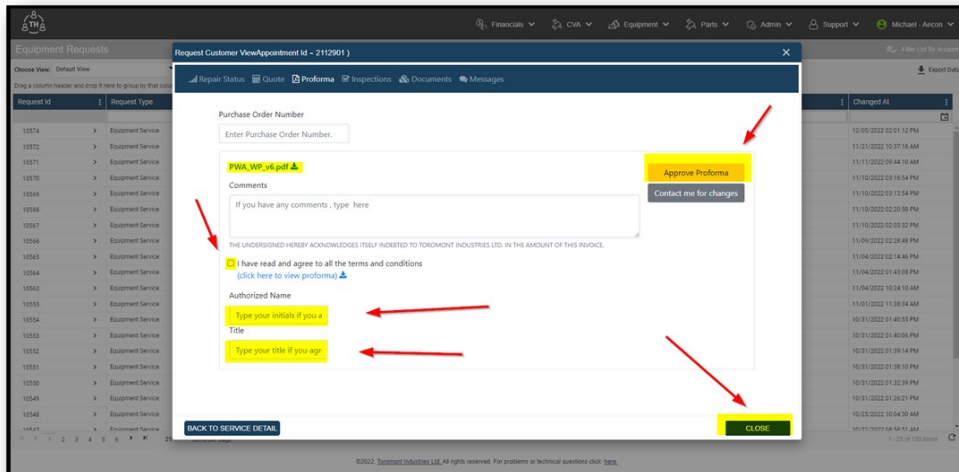
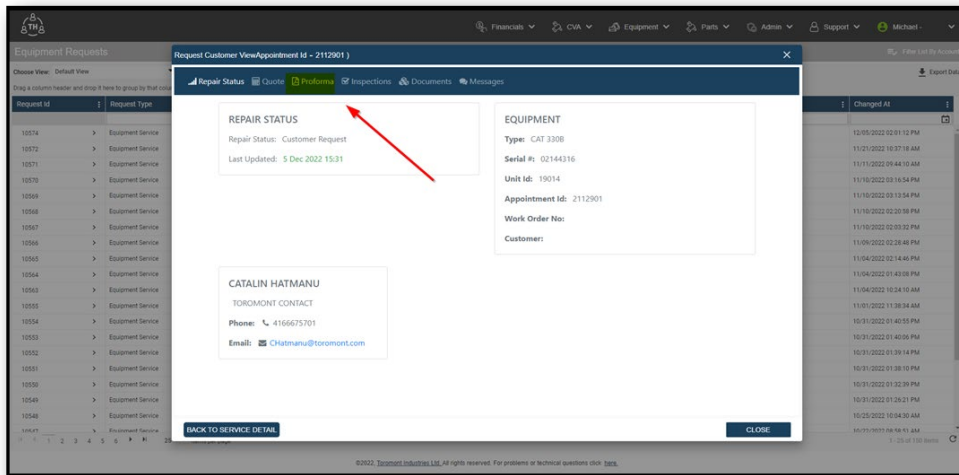
CATALIN HATMANU
 TOROMONT CONTACT
 Phone: +1 514 666 75701
 Email: CHatmanu@toromont.com

BACK TO SERVICE DETAIL | **CLOSE**

5.10 Equipment - Approve Service Quote/Proforma

From the “View Repair Status” screen:

- › Select the “Quote” or “Proforma” tab and open the PDF file to check the document and make sure all is good.
- › Add any comments about the Proforma file and check the box to acknowledge the terms and conditions.
- › Add the initials and job title of the requester and select “Approve Proforma” before closing the pop-up window when you’re done.

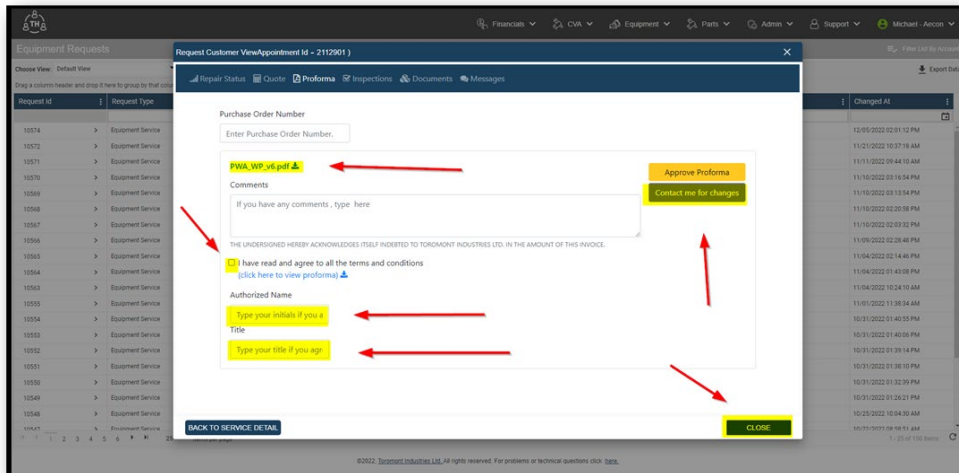
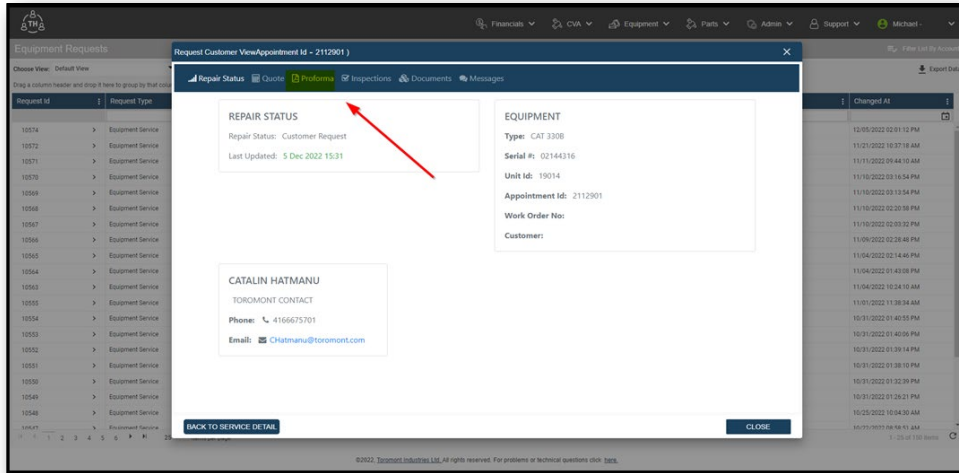


5.11 Equipment - Dispute Service Quote/Proforma

From the “View Repair Status” screen:

- › Select the “Quote” or “Proforma” tab to open the PDF file and check the document.
- › Add any comments about the Proforma file and check the box to acknowledge the terms and conditions.
- › Add the initials and job title of the requester and select “Contact me for changes”.
- › Close the pop-up window when you’re done.

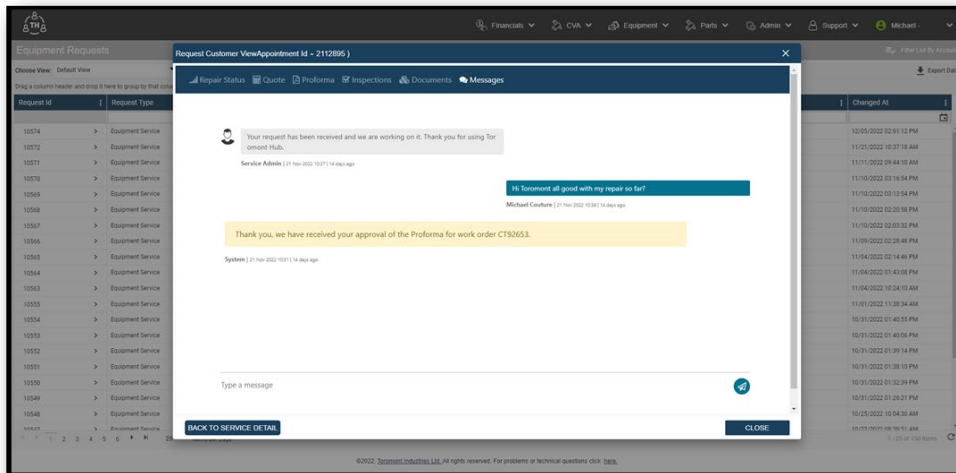
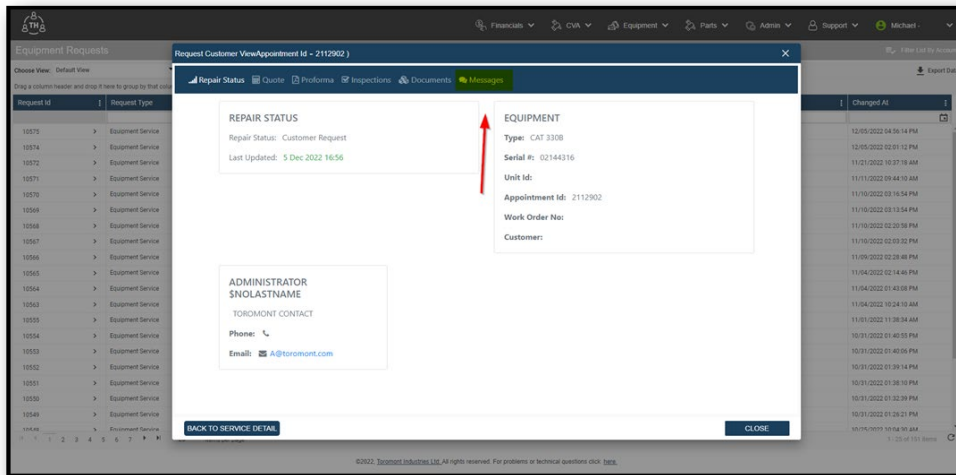
* A Toromont representative will reach out within 1-3 business days to clarify the quote or proforma.



5.12 Equipment - Messaging for Service Request

From the “View Repair Status” screen:

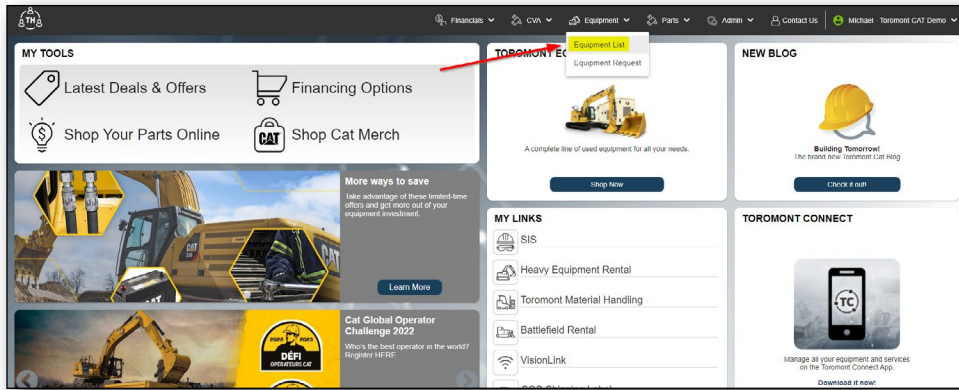
- › Select the “Messages” tab and start typing a message in the box.
 - › Select the blue arrow icon to send the message.
- View and write messages directly to the Toromont Cat Service team
 - Keep track of when a quote or proforma was approved and by which user



5.13 Equipment – Map View & Map History

From the home screen:

- › Select “Equipment List” from the “Equipment” menu
- › Search for desired piece of equipment using serial #, make or model
- › In the column headers go to “Last Known Location”
- › Select the link that is underlined to view equipment on the map



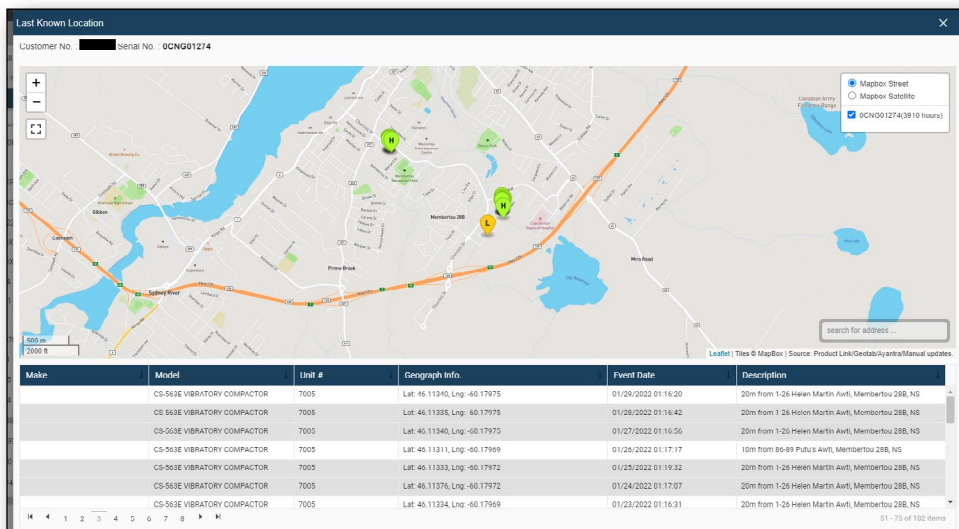
Equipment List

Choose View: Default View

25 columns hidden (see step 8 from 8 to reveal the first column)

Connected	Serial #	Customer #	Make	Model	Unit #	Hours	Year	Date Purchased	Last WD	Last Known Location	Last Known Date
	#56 WINCH 01	1351080	CATERPILLAR (SEE AA)	D9D							
	000001	1351080	METSO MINERALS	HP4						TOM - Toromont/CAT Branch 00 - Conco	12/21/2017
	0000217233	1351080	TRAMBE PRODUCTS	SURVIVY CTR							
	0000217245	1351080	TRAMBE PRODUCTS	SURVIVY CTR							
	000051100	1321080	DOUGAN INDUSTRIAL/AMERICA	DK140LDR			2009	10/20/2014			
	000097	1321080	11-11 MANUFACTURING	4301							
	00011745	1321080	UNKNOWN	740B							
	00012245-1	1321080	UNKNOWN	740B							
	00012245-2	1321080	UNKNOWN	740B							
	000198198	1351080	CATERPILLAR	420F2T							
	000500	1351080	JOHN DEERE	744E	3175		1999	12/22/2014		TOM - Toromont/CAT Branch 00 - Conco	10/03/2014
	00050192A	1351080	CATERPILLAR	420D							
	01000564	1351080	CATERPILLAR	530DL						TOM - Toromont/CAT Branch 00 - Conco	06/08/2015
	01000510	1351080	CATERPILLAR	314						TOM - Toromont/CAT Branch 00 - Conco	05/13/2010
	01011044	1321080	CALLUPILLAR	329						TOM - Toromont/CAT Branch 02 - H&B	11/10/2010
	01061105	1321080	CALLUPILLAR	AP3550						TOM - Toromont/CAT Branch 02 - H&B	09/02/2015
	01070110	1321080	CALLUPILLAR	AP355L						TOM - Toromont/CAT Branch 02 - H&B	07/21/2010
	0190305119767	1351080	TRANSCORE	MT2000						TOM - Toromont/CAT Branch 02 - H&B	07/21/2010
	0190217418429L	1351080	TRANSCORE	MT2000							

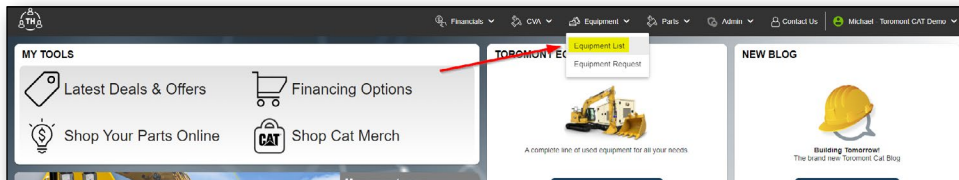
25 items per page | 25 of 6343 items



5.14 Equipment - Work Order

From the home screen:

- › Select “Equipment List” from the “Equipment” menu
- › Search for desired piece of equipment using serial #, make or model
- › In the column headers go to “Last WO”
- › Select the link that is underlined to view equipment work order history
- › Filter desired date range in the top and select refresh
- › Select in the top right “Export Data” to export equipment work order history to an excel file



Connected	Serial #	Customer #	Make	Model	LINE #	Hours	Year	Date Purchased	Last WO	Last Known Location	Last Known Date
	956 W80N01	1351080	CATERPILLAR (SEE A/J)	540							
	000001	1351080	METSO MINERALS	MP4						TOR - Toromont/CAT Branch 00 - Conca	12/21/2017
	0000217243	1351080	TRAMBLE PRODUCTS	SURVER CTR							
	0000217245	1351080	TRAMBLE PRODUCTS	SURVER CTR							
	000021608	1351080	DOOSAN INFRA/COFF AMERICA	DA140LCR			2009	10/20/2014			
	000007	1351080	V.I.I. MANUFACTURING	430F							
	00017345	1351080	UNKNOWN	740J							
	00012493	1351080	UNKNOWN	740B							
	00012492	1351080	UNKNOWN	740B							
	00070106	1351080	CATERPILLAR	420F2P						TOR - Toromont/CAT Branch 00 - Conca	10/03/2014
	000500	1351080	JOHN DEERE	744E		3175	1999	12/02/2014			
	00050002A	1351080	CATERPILLAR	420D						TOR - Toromont/CAT Branch 00 - Conca	09/08/2015
	00100044	1351080	CATERPILLAR	530D							
	00100010	1351080	CATERPILLAR	314							
	00100044	1351080	CATERPILLAR	229						TOR - Toromont/CAT Branch 00 - Conca	11/16/2015
	00164100	1351080	CATERPILLAR	AP1040						TOR - Toromont/CAT Branch 00 - Conca	09/02/2015
	00107910	1351080	CATERPILLAR	AP1040						TOR - Toromont/CAT Branch 00 - Conca	07/21/2015
	0019008V107917	1351080	TRANSCORE	MT2000							
	0019007V107916	1351080	TRANSCORE	MT2000							

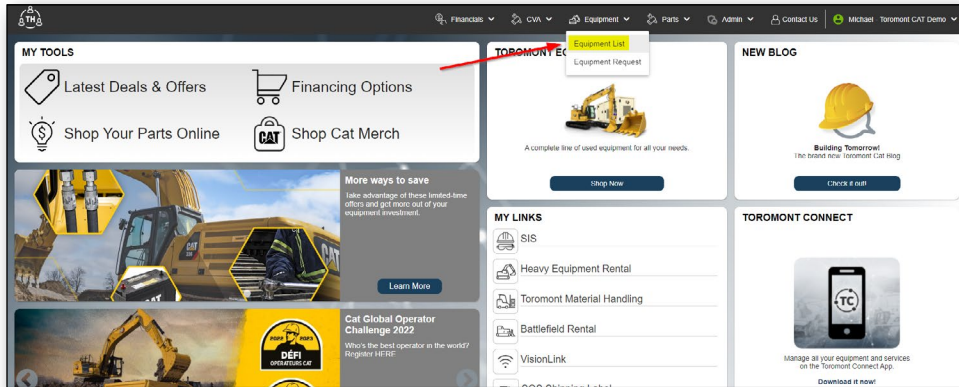
Open Date	Work Order	Hours	Notes
Sep-13-2010	DG18349-01	0	Install the bucket tips that were ordered by the sales co-ordinators. CUSTOMER COMPLAINT; REMOVE AND INSTALL BUCKET TIPS; REPAIR PROCESS COMMENTS; REMOVED BUCKET TIPS. INSTALLED NEW WIDE TIPS.

Open Date	Work Order	Hours	Notes
9/13/2010	DG18349	0	Install the bucket tips that were ordered by the sales co-ordinators. CUSTOMER COMPLAINT; REMOVE AND INSTALL BUCKET TIPS; REPAIR PROCESS COMMENTS; REMOVED BUCKET TIPS. INSTALLED NEW WIDE TIPS.

5.15 Equipment - Notes

From the Home screen:

- › Select “Equipment List” from the “Equipment” menu
- › Search for desired piece of equipment using serial #, make or model
- › In the column headers go to “Product Comment”
- › Select the pencil and paper icon
- › Add any desired notes for that specific piece of equipment



Equipment List

Choose View: Default View

Sort a column header and click it here to group by that column

Model	Unit #	Hours	Year	Date Purchased	Last WO	Last Known Location	Last Known Date	Item#?	Type	Product Comment
54C TRACK TYPE TRACTOR			1999	03/30/2016					CAT - Machine	
980 TRACK LOADER			1994	01/06/2017					CAT - Machine	
903 TRACK LOADER	20817		1994	03/06/2015	02/05/2015	TOR_ToromontCAT Branch 00 - Conco	03/06/2015		CAT - Machine	
983C WHEEL LOADER	1		1997	04/05/2016	04/07/2016				CAT - Machine	
932C TRACK LOADER	10611		1999	04/11/2016	04/04/2016	TOR_ToromontCAT Branch 00 - Conco	04/09/2016		CAT - Machine	
743 ARTICULATED TRUCK	29		2018	09/29/2018					CAT - Machine	
743 ARTICULATED TRUCK			2018	10/12/2018					CAT - Machine	
249L EXCAVATOR	11373		1998	01/11/2017	02/14/2014	TOR_ToromontCAT Branch 00 - Conco	09/30/2014		CAT - Machine	
959F 9 WHEEL LOADER	33 117	42763	1994	04/20/2016	04/15/2016	10991 from 7165 Avenue, Westvale, Nc.	01/22/2021		CAT - Machine	
329L EXCAVATOR		1954	1998	05/19/2015	11/13/2021				CAT - Machine	
1400 MOTOR GRADER	E160-607	8656	1984	03/24/2016	11/03/2024				CAT - Machine	
4P 1000B ASPHALT PAYER		4362	1999	04/11/2018	03/15/2018	TOR_ToromontCAT Branch 00 - Conco	04/11/2018		CAT - Machine	
C556		326	2015	02/27/2017					CAT - Machine	
64N TRACK TYPE TRACTOR		7957	1987	07/04/2014	01/24/2014	WIS - ToromontCAT Branch 04 - Elwood	09/12/2014		CAT - Machine	
657F W/FL TRACTOR	657	8957	1988	02/16/2017	02/24/2017	As from 0 - Add South Service Road.	07/10/2016		CAT - Machine	
140 MOTOR GRADER	406	14750	1986	06/16/2015	04/01/2020				CAT - Machine	
964U W/FLT LOADER	313	15300	2004	04/05/2016	01/07/2016	CA - ToromontCAT Branch 01 - Conco	04/05/2016		CAT - Machine	
4P 1000B ASPHALT PAYER	694	8973	2009	09/04/2018	03/09/2018	TOR_ToromontCAT Branch 00 - Conco	09/04/2018		CAT - Machine	
992B WHEEL LOADER	14 8042	29198	2009	11/20/2015	09/22/2018				CAT - Machine	

1 20 of 613 items

Add Comment for Equipment - 021Z00555

Comment *

1 / 2000

SAVE

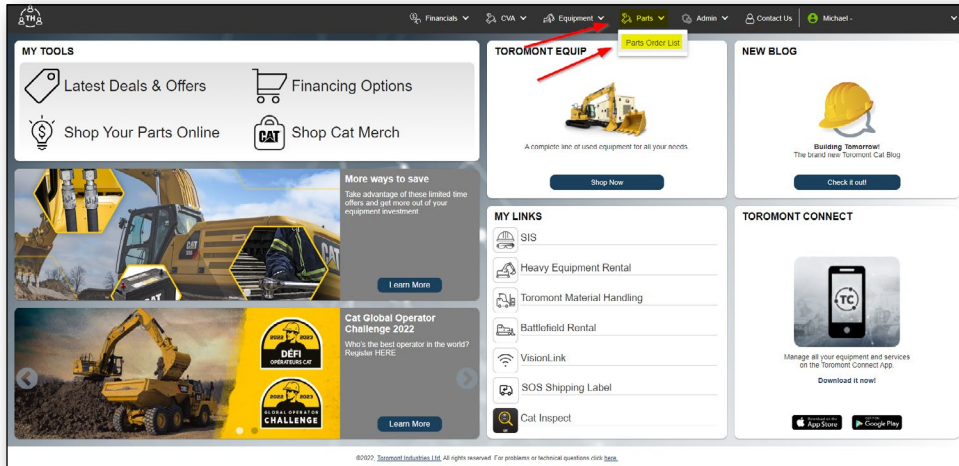


6 Parts

6.1 Parts – View

Find a list of all parts ordered including the serial number, quantity, order status and unit price.

- › From the “Parts” menu, select “Parts Order List”



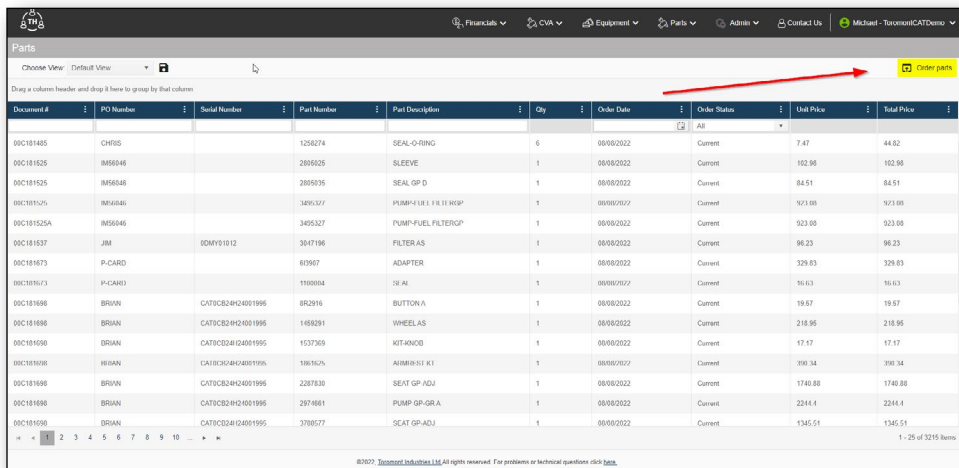
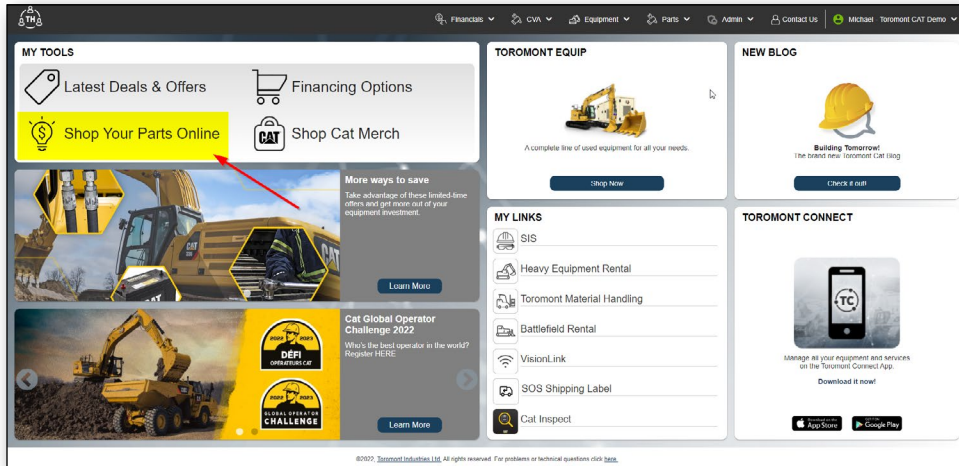


7 Parts.cat.com (PCC)

7.1 PCC Access – Parts Order

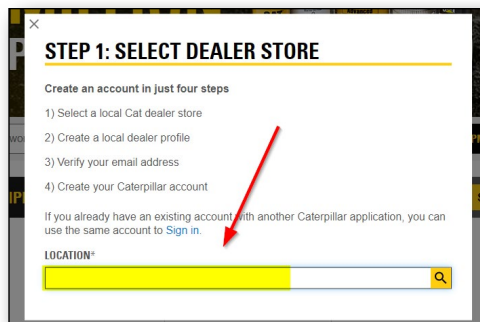
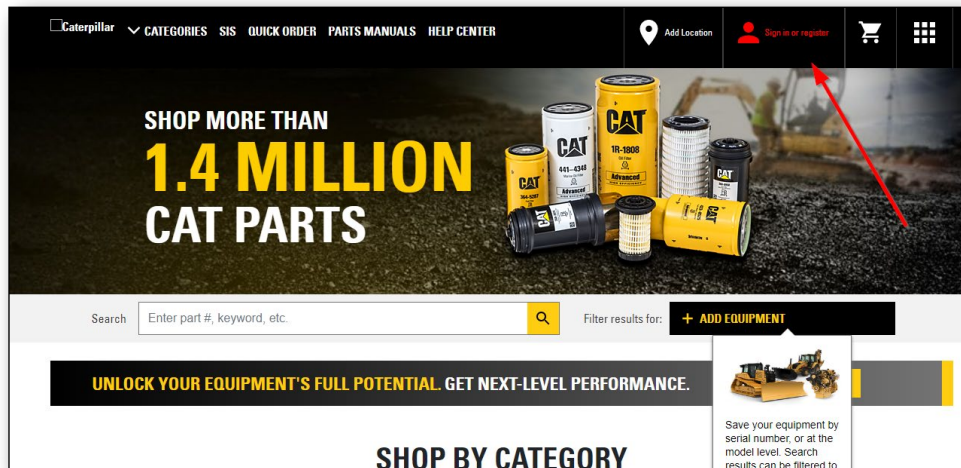
From the Home screen:

- › From the “My tools” panel, select “Shop your parts online”
- › From the “Parts” screen, select “Order Parts” in top right corner



7.2 PCC Access – Create an Account

- › Select “Shop your parts online” from Home screen or “Order Parts” on Parts screen to visit Parts.cat.com
- › Select “Sign In or Register”
- › Select “Register”
- › Input desired location
- › Select store
- › Fill out necessary contact information then create an account
- › A Toromont representative will reach out and complete your account



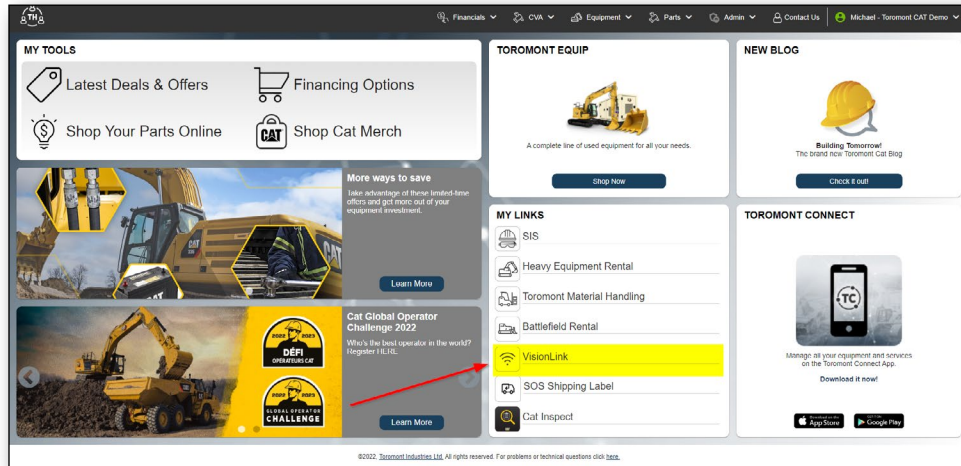
7.3 PCC Access – Benefits

- Order parts any time of day, 365 days a year
- More accurately find parts needed for your equipment
- Faster ordering process compared to over the phone
- View parts availability quickly
- View available used parts inventory
- Access parts manuals
- Help center is available to provide support or to answer any questions



8 VisionLink Access

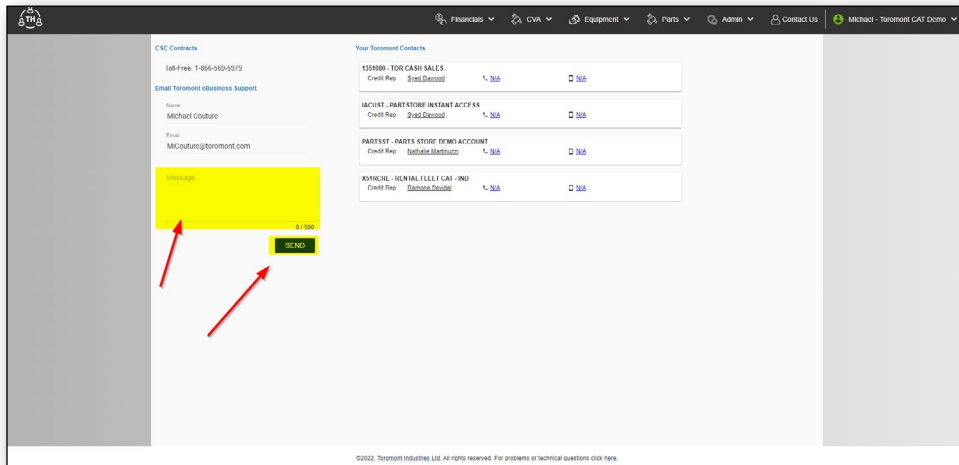
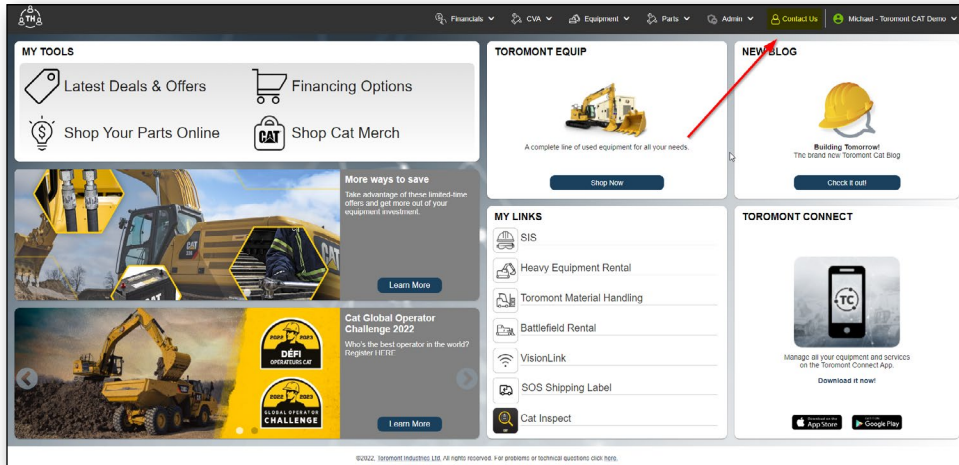
- › On the Home screen, select “VisionLink” from the “My Links” panel





9 Assistance

- › Select “Contact Us” from the menu
- › In the section “Message” write any questions/comments
- › Select “Send” and your message will be emailed to us.
We will get back to you within 1-3 business days.



Toromont Connect + Toromont Hub: Get the complete picture

By using Toromont Hub for all your business administration needs and Toromont Connect to monitor day-to-day operational information, you'll now have total visibility and control of all your Toromont Cat equipment and services – available anytime, anywhere.



Toromont Connect

Toromont Connect is an easy-to-use mobile application for instant access to fleet information. You can use it to manage your fleet, connect to your local branch, order parts and more, right from your smartphone.



Toromont Hub

Toromont Hub is a web application for administering all your Toromont equipment and services. You can use it to manage invoices, service contracts, equipment data, parts orders and more.

Equipment Management at a glance

Functions	Toromont Connect (mobile)	Toromont Hub (desktop)
Track hours, location, fuel, operator performance, machine health and utilization (Cat and non-Cat equipment)	✓	✓
Order parts, view order history, and track parts	✓	✓
Request Service	Available by June 2022	Available by June 2022
Request Connectivity	✓	✓
Get health & maintenance alerts	✓	✓
Manage planned maintenance	Available by June 2022	Available by June 2022
Equipment Maintenance (CVA)		✓
Connect with Toromont experts	✓	✓
Access operation & maintenance manuals, warranties, work orders, service history, etc.	✓	✓
Immediate fault notification	Available by June 2022	Available by June 2022
Activities Hub • Notifications • Requests	✓	✓
Financial Information		✓