



SUPPORT PORTAL

BELL EQUIPMENT SUPPORT PORTAL

**PRODUCT INSTALLATION & AFTERSALES
BELL CSC's & DEALERS**
Including Sub Dealers

Excluding Risk Assessments & Field Inspection Reports



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Revision Date: 16 February 2024
Document Revision: 1.3
Support Portal Revision: v2.7.5

Support Portal User Guide

Revised: 09 February 2024

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BELL SUPPORT PORTAL

Notes:

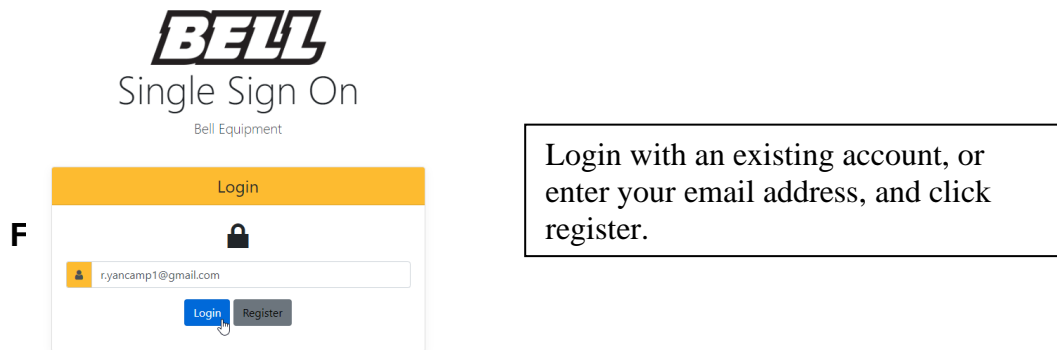
Link*: <https://business.bellequipment.com>

Latest Release Notes: ink*: <https://apps.bellequipment.com/SupportPortal/Home/ReleaseNotes>

Instructions:

Register or login to Bell Equipment's Business Portal by visiting <https://business.bellequipment.com> (It would be a good idea to bookmark it for future ease of input)

- 1) After clicking on the Link* / bookmark for the Business Portal, the login / sign in screen will appear on your Browser – see **Fig. 01** below:



What to do here?

1. Key your **Email Address (Username)** and **Password** into the fields provided. (These will have been set by you on your initial registration/signup.)

***NOTE:** Internal Bell Equipment Users should make use of the standard bellequipment.com email addresses in full.

2. Once the data has been keyed, click on the **Login** button.

1. BUSINESS PORTAL LAYOUT AND OVERVIEW

The next screen that appears will be a screen that displays Bell Equipment's Terms and Conditions, once you have read these conditions, click **Accept**



Dashboard Help

ryancomp.1@gmail.com

Terms & Conditions Of Use

By accessing your account, you are agreeing to abide by the following Terms and Conditions of Use:

- You agree to keep your login credentials confidential and to not share it (them) with anyone. If you suspect that others have obtained your login credentials contact us immediately.
- You certify that any information provided by you is true, accurate and complete.
- You understand and accept that as a security measure for administrative reasons, we can revoke your access if you fail to abide by the Terms and Conditions of Use.
- You understand and accept that we are not responsible for any losses or damages incurred by anyone because of:
 1. The use of the information available in your account
 2. Any restrictions, delay, malfunction, or unavailability of your account
- You understand and accept that by using our online platforms, we can communicate with you via e-mail.
- Bell Equipment's Global Privacy Policy can be accessed by clicking [here](#)
- To continue, choose "Accept" to indicate your acceptance of these Terms and Conditions. If you do not agree with these Terms and Condition you will not be able to access your account.

If you use another type of browser software you should check with your software supplier to make sure that your browser has 128-bit secure socket layer encryption capability.

Note: We are not responsible for any difficulties in downloading and installing software. Software suppliers are responsible for providing technical support. It is important that you sign out and close your browser before leaving this computer unattended. This will prevent unauthorized access to your personal information.

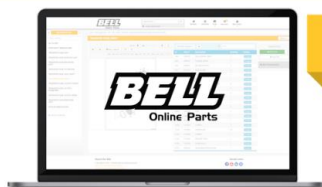
Accept

After accepting the Terms and Conditions of Use, you will be redirected to the Home Page of the Business Portal.



Dashboard Help

ryancomp.1@gmail.com



Register Today



Have you registered for access to Bell Online Parts? | [Click here to Register](#)



My Profile
My Personal Data
Two-factor Authentication
Change Password
Logout

Training Account's Applications



Pre-Owned Equipment



Bell Equipment Website



Bell Investor Relations



SpecCheck



BEWS



Fault Codes



Factory Codes



Bell Promo Shop

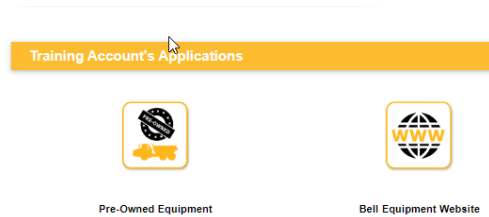


Bell Aftermarket Services

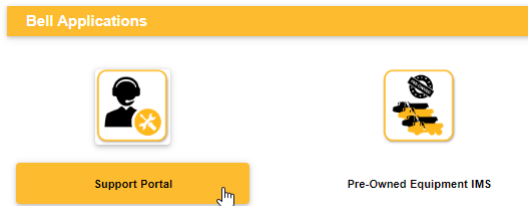
Bell Applications

On this dashboard, on the top right you will see a User Menu where the logged in user can view their profile, manage personal data, enable Two Factor Authentication as well as change their passwords (Note: This is different for internal Bell Equipment users who authenticate via the Microsoft Entra ID Platform)

Under the Users Applications you will see ALL applications the user currently has access to.



Applications under Bell Applications are all applications the logged in user can request access to.



2. SUPPORT PORTAL

a) Registration

To access the support portal if the icon "Support Portal" is under Bell Applications this will mean you need to complete the application process that is initiated by clicking this icon.

If you already have access to the Support Portal this will appear under YOUR Applications on the top of the Business Portal.

b) Dashboard

Once logged into the Support Portal, you will be presented with a Dashboard.

This will display details around the CSC Machines you have access to.

You will be allocated your branches/CSC's upon registration.

**It is important to note that users individual access to Machines and customers is restricted to ONLY display machines and customers specific to YOUR CSC/Branch. This allows us to isolate users and protect confidential data from other un-authorised users in other CSC's/Branches*

This is a sample Dashboard view - see **Fig. 02** as shown below:

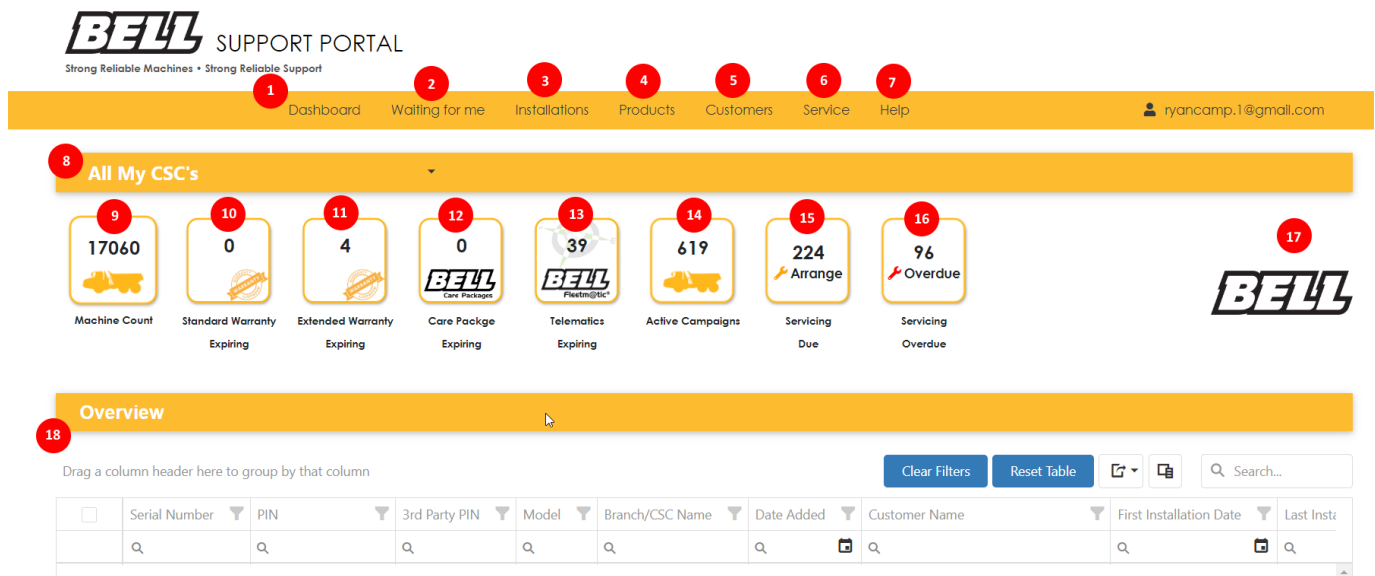


Fig. 02 Support Portal Dashboard

c) Screen layout information

1. **Dashboard** – Dashboard Menu Option
2. **Waiting For Me** – This will open a page of all OPEN tasks or inputs waiting for you.
3. **Installations** - This menu area contains all the details around New Installations, Installations in Progress in YOUR CSC as well as installation history of all machines in your specific CSC.
4. **Products** – This contains information relating to products you have access to.
 - **Lookup** – Lookup all products by Serial/Vin Number
 - **Transfer** – Transfer a product to another CSC or Customer *(Note this is NOT an installation process, but a way to update records if the sale was done outside of your entity IE: Sale of products between two customers directly with NO dealer interaction)*
 - **Package Renewals / Additions** – Add or renew existing Fleetmatic / Telematics, CarePackage or Extended Warranty on a product that is assigned to your CSC.
5. **Customers** - This search feature allows you to search or create customers and customer contacts related to your CSC's or the products you manage
6. **Service** – View machine Service information and QER's **Quality Evaluation Reports*
7. **Help** – Log all Help requests via this Help Menu, and one of our team members will assist you as soon as possible
8. **All My CSC's** – This dropdown will show all the CSC's that the logged in user has access to
9. **Machine Count** – Count of machines the selected CSC has access to
10. **Standard Warranty Expiring** – Count of machines whose Standard Warranty is

- due to expire in the next 30 Days
11. **Extended Warranty Expiring**– Count of machines whose Extended Warranty is due to expire in the next 30 Days
 12. **Care Package Expiring** – Count of machines whose Care Packages are due to expire in the next 30 Days
 13. **Telematics Expiring** – Count of machines whose Telematics is due to expire in the next 30 Days (*Fleetmatic, LiveLink, Komexs and TP-Link*)
 14. **Active Campaigns** – Count of machines that form part of a Technical Campaign
 15. **Servicing Due** – Count of machines Due for Service in the next 30 Days
 16. **Servicing Overdue** – Count of machines overdue for service
 17. **Dealer Specific Logo** – Dealer Specific Logo
 18. **Overview Table** – Table displaying Overview of returned data


d) Waiting for Me

If you have any Installations in Draft, Pending Uploads, or returned to you for any reason you will find this information here


[Portal](#) / [Installations](#) / Waiting For Me

Waiting For Me

Drafts

Serial Number	PIN	Customer Name	Dealer Name	Installation Date	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
No data					

Pending Upload

Serial Number	PIN	Customer Name	Dealer Name	Installation Date	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

3.INSTALLATIONS

a) New Installations

This menu option allows users to Install Products. (New/Used or Demo products are installed via this New Installation Menu

To Install a product, simply search for the corresponding Serial or PIN Number that you have been allocated by Bell Equipment

Portal / Installations / New Installation

New Installation

PIN/VIN/Serial No: BAT28410

Customer Fleet Name: Customer Fleet Name (Optional)

Name: Customer Name (Optional)

Branch: Select...

Search

Serial Number	PIN	3rd Party PIN	Model	Machine No.	Description	Manufacturer / Make	Customer Fleet Name	Action
BAT28410	AEBA845EV02106574		B45E	A845E21	ADT,B45E,STAGE 3A,WDB	Bell Equipment	LTRSB45E#6574	Install

Fig. 03 New Installation Search

Simply enter the Serial/PIN number, and select search, select the corresponding product from the search results by selecting the “Install” Action on the set of results.

Note: If you search for a portion of the PIN, please ensure you select the correct product from the multiple entries returned from the search.

Selecting Install, will initiate the Installation process that will be explained below

- 1) If there is an existing assigned customer it will appear under the Linked Customer data, otherwise you have the ability to Search for a customer, or create a new customer

Portal / Installations / New Installation / Assign Customer

Installation Customer

Linked Customer

Customer not available

New Customer

Search Existing Customers

Name: Customer Name

Search

Adding a NEW Customer

Bell Equipment Sales South Africa customers CANNOT be added via the portal, and the products MUST be assigned via Salesforce.

To add a new customer click “New Customer”

Complete the required new customer fields in the pop up

Support Portal

New Customer

Customer Information

Customer Name: *

Branch: *

Parent Customer / Owner (If Applicable):

Account Owner:

Phone 1:

Website:

SAP Account Number:

VAT/Tax Number:

Address Information

Billing Street:

Shipping Street:

Once you have added the new customer click Install, alternatively search for a customer already allocated to your account by entering the customer name in the search block.

Once you have identified the correct customer select the “Install” action

Search Existing Customers

Name: Test

Search

Customer Name	Phone 1	SAP Account Number	Action
testRC			Install Details

Completing the Installation Certificate

Once you have selected the correct customer you will be re-directed to a page that has a number of different stages that need to be completed.

This view below shows stages with an exclamation mark that need to be completed, whilst ones with a green tick have been completed successfully.

*Please check all data correctly during each step outlined below

Portal / Installations / Waiting For Me / Machine Installation

Installation Details

1	Customer Details	!
2	Seller Details	!
3	Installation Details	!
4	Product Details	!
5	Warranty Details	✓
6	Care Package Details	✓
7	Telematics Details	✓

Submit

Step 1: Customer Details

- You are required to capture the correct details of the customer to whom the machine will be allocated to.
- Clicking Edit and then Update will place the form in Edit mode to allow you to capture the required details. – At this point you can also capture contact's specific to the selected customer

1 Customer Details

Edit

Customer Details

Customer Name: * testRC SAP Account Number: *
Phone 1: * Phone 2: * Customer Fax: *

Installation Address Details

Street: * City: * Province/State: *
Postal Code: * Country: *

Customer Representative Details

New Contact Update Contact

Name: * RyanTest Email: * test@test.com
Mobile Phone: * 123 Job Title: *

The Street field is required.
The City field is required.
The Province/State field is required.
The Postal Code field is required.
The Country field is required.

New Contact

Full Name: * Super's Full Name Email: * Super@customerdomain.com
Mobile Phone: * 0000000000 Job Title: * Chief Super

Update

Customer Details

Customer Name: * testRC SAP Account Number: *

Step 2: Seller Details

- If you have multiple CSC's assigned to your profile, select the correct Branch, and Sales & Customer support reps responsible for the specific unit.

2 Seller Details

Update

Seller Details

Branch: * Bell Empangeni

Physical Address: * 1 Irvine Bell Dr Empangeni 3800 KwaZulu-Natal South Africa

Region: * South Africa - Coastal (KZN)

Sales Rep Details

Sales Rep: * [Redacted] Phone: [Redacted] Email: [Redacted]

Customer Support Rep Details

Support Rep: * [Redacted] Phone: [Redacted] Email: [Redacted]

Step 3: Installation Details

- If this is a new product please select Installation Type = NEW
- As this example is a Pre-Owned product and we have determined it has already been installed, we will pre-populate some details.
- Update the hours at time of installation as well as the installation date

3 Installation Details

Update

Installation Details

Installation Type: * Pre-Owned

Installation Date: * Monday, January 15, 2024

Installation Machine Hours: * 17880

Telematic Hours: * 17881.2

Step 4: Product Details

- In this area we will pre-populate machine specific information. If you are installing an ADT you will need to update the GreedyBoards (Side Extensions) and Bin Liner options as well as capture the customers Fleet Name

You also have the ability to add any aftermarket attachments to this section such as different buckets or attachments that you have fitted to the product.

4 Product Details ✓ Update

Product Details

PIN: * AEBAB45EV02106574 Model: B45E Serial Number: BAT2B410

Engine Model: ENGINE.OM471LA.ROW Engine Number: 471 951 C 0415997 Transmission Number: 6620031100

Plant Size: Large Greedy Boards: * ☐ YES ☒ NO Bin Liners: * ☐ YES ☒ NO Fleet: LTRSB45E#6574

Aftermarket Attachments Add Attachment

Attachment Type	Serial Number	Attachment Capacity	Notes	
Sample Bucket for TLB	Bucket002	800KG	Bucket Supplied by supplier x	Edit Delete

Step 5: Warranty Details

- In this area we will pre-populate machine specific standard warranty information.

5 Warranty Details ✓

[Edit](#)

Ext Warranty Captured: * ☐ YES ☒ NO

Standard Warranty

Hours: * 9999

Months: * 12

- If your product is being installed with Extended Warranty, select Edit, and Ext Warranty Captured
- Now capture the Extended Warranty Type, Hours, Months, Distance and Price (obtained from the extended warranty calculator provided by Bell Equipment Group Services Pty Ltd)

Extended Warranty

Extended Warranty Type: * Wet Drive Train & Hydraulics (WDT_HYD)

Extended Warranty Hours: * 6000 Extended Warranty Months: * 36 Distance: * 250

End Date: Friday, January 08, 2027 Price: * 999 Currency: * ZAR

[BELL Extended Warranty Calculator](#)

Step 6: Care Package Details * This will only be available if it has been activated against your CSC or product – Contact your Bell Equipment Factory representative for more information.

- If required, change the Care Package Captured to YES and complete the required details

6 Care Package Details

Update

Care Package Details

CarePackage Captured: ☒ YES ☐ NO

Care Package Type: * Starter Care Basic

Package Period

Care Package Term: * Up Front

Add-On Options: Dusty Environment, 250hr Service

Months: * 36 Hours: * 2500 Distance: * 100

Price: * 999 Currency: * ZAR [BELL Care Package Price Calculator](#)

- Care Package Term: UpFront – Payment Made for the entire package UpFront
- Care Package Term: Per Hour – Payment Made for xxx

Step 7: Telematics Details * This will only be available if the product you are installing has telematics enabled.

- If required, change the Telematics Captured to YES and complete the required fields

FLEETMATIC

- This is Bell Equipment's telematics offering – Select the Package, who should receive the reports as well as the months you would like the package available for.
- Where possible the system will populate the GPRS and Satellite IMEI numbers.
- You are then able to configure custom Shift schedules (if you would like these the same as your existing fleetmatic units, simply leave these unchanged/blank)

7

Telematics Details

Update

Fleetmatic Details

Telematics Captured: *
☒ YES
☐ NO

Reporting: *
☒ YES
☐ NO

Package: *
Premium

Months: *
36

Email Reports: *
ryancamp1@gmail.com

GPRS IMEI No.: *
352739092390092

Fleetmatic Report: *
German

Satellite IMEI: *
300234066331910

1st Shift Start Time

2nd Shift Start Time

3rd Shift Start Time

Monday:	12:00 AM	Monday:	8:00 AM	Monday:	4:00 PM
Tuesday:	12:00 AM	Tuesday:	8:00 AM	Tuesday:	4:00 PM
Wednesday:	12:00 AM	Wednesday:	8:00 AM	Wednesday:	4:00 PM
Thursday:	12:00 AM	Thursday:	8:00 AM	Thursday:	4:00 PM
Friday:	12:00 AM	Friday:	8:00 AM	Friday:	4:00 PM
Saturday:	12:00 AM	Saturday:	8:00 AM	Saturday:	4:00 PM
Sunday:	12:00 AM	Sunday:	8:00 AM	Sunday:	4:00 PM

JCB - LiveLink

As a distributor of JCB Products in Southern Africa, when you sell /install a JCB product that has LiveLink available you are required to complete the below LiveLink Details

7

Telematics Details

Update

Live Link Details

Telematics Captured: *
☒ YES
☐ NO

Reporting: *
☒ YES
☐ NO

Package: *
LiveLink

Months: *
36

Email Reports: *
reportemail@email.com

KOBELCO – KOMEXS

As a distributor of Kobelco Products in Southern Africa, when you sell /install a Kobelco product that has Komexs available you are required to complete the below Komexs Details

7 Telematics Details

Komexs Details

Telematics Captured: *

☒ YES ☐ NO

Reporting: *

☒ YES ☐ NO

Package: *

LiveLink

Months: *

36

Email Reports: *

reportemail@email.com

Update

SUBMITTING INSTALLATION:

If you have successfully completed the installation form you will have all steps completed with a green tick.
You can now select Submit

Installation Details

1	Customer Details	✓
2	Seller Details	✓
3	Installation Details	✓
4	Product Details	✓
5	Warranty Details	✓
6	Care Package Details	✓
7	Telematics Details	✓

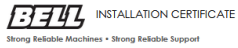
Submit

REVIEWING INSTALLATION:

Once you have selected Submit you will be presented with an electronic copy of the installation certificate.

There are now Two options to have this signed off

- E-Sign – Send an Electronic Copy of this document to be signed by the customer
- Export – Export and print a hard copy of this document to be manually signed by the customer then uploaded by you the sales/after-sales rep.



Product Details
 PIN: * HAR3DXSUHL2778206
 Engine Model:
 Plant Size: Small

Model: 3DX Plus
 Engine Number: GN65160U96720E

Serial Number: JBH29998390
 Transmission Number: 000000

E-Sign

Export

1) The E-Sign Process will prompt you for confirmation of who the form will be emailed to

Digital Signature

×

The current installation will be emailed to the selected Owner/Representative : **customersemail@email.com** to electronically sign.

The installation date is set to: **Monday, January 15, 2024**

Do you wish to continue ?

Confirm

The customer will receive a mail to review and electronically sign the installation.

From: noreply@bellequipment.com <noreply@bellequipment.com>
 Sent: Monday, January 15, 2024 9:07 PM
 To: Customer
 Subject: Sign-Off for BELL Machine Installation Certificate HAR3DXSUHL27XXXX



Hi CUSTOMER NAME

We would like to thank you for your recent purchase of a 3DX [Plus](#)

To enhance your Bell [ownership](#) experience your machine installation certificate is linked below for your attention.

Please would you review the installation and sign it off by following the link below. Your signature initiates your warranty period, so we kindly ask that you complete the process as soon as possible to ensure that your machine is covered.

Serial Number : JBH2999XXXX

PIN : HAR3DXSUHL27XXXX

Model : 3DX Plus

Installation Type : New

Installation Date : 2024-01-15

Support Rep : supportrep@email.com

Sales Rep : salesrep@rmail.com

Review

Clicking the “Review” button will open the certificate for signature by the customer.

Machine Installation Certificate Customer Sign Off

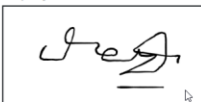
Details:
 PIN : HAR3DXSUHL277XXXX
 Model : 3DX Plus
 Serial Number : JBH2998XXXX
 Installation Date : 2024-01-15

[View Certificate](#)

Your Name:

Customer

Draw your signature below:



Undo

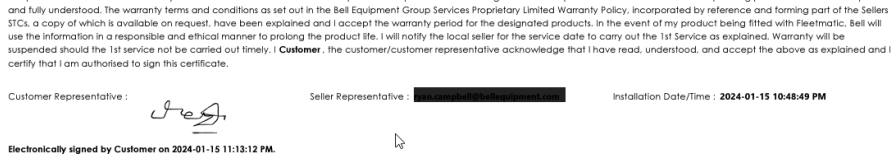
Clear

Submission of this form is subject to Bell Equipment's Privacy Policy and Terms & Conditions

Submit

Once signed the sales person will receive an email with a link to approve the signed copy that the customer has signed.

- Viewing the certificate will generate a PDF copy of the certificate the customer has just signed



Once the salesperson signs this off, the customer will receive a copy of the signed installation certificate as well as a copy of the Warranty Policy applicable to the installation of this product.

2) Manual Signoff Process

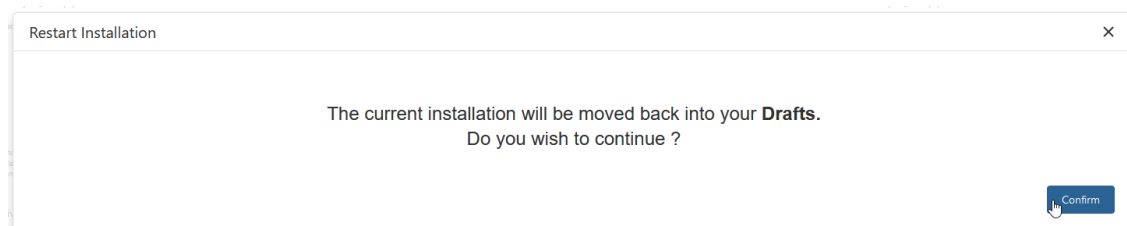
If you have selected Export / Manual sign a physical PDF document will be downloaded to your PC. – You as the sales rep will have to print this off, and once signed by the customer visit the Waiting for Me page on the portal, and UPLOAD this new physically signed document.

Pending Upload

Serial Number	PIN	Customer Name	Dealer Name	Installation Date	
JBH299XXXX	HAR3DXSUHLXXX	TESTING - KINDLY IGNORE	Bell Test	Monday, January 15, 2024	Select Upload

*If you select “Select” you will be able to view the certificate again.

Note: At the bottom of this page there will now be a “Restart” Button
This will restart the entire installation process, and move this back to Waiting for me, under Draft.



You have now successfully submitted your installation certificates that will be signed off by the Warranty, Care Package and Telematics teams .

If any of these teams find any errors or issues with the data you have submitted they will return the installation to you electronically for your correction.

You will receive an email with the return comments, and be able to view this again under the Waiting for me, Returned Installation Section.

b) CSC Installations

This is a simple table of installations in progress by your CSC's/Branches that you have access to.

c) Installation History

This is a simple table of installations that have been completed by YOU or your Branch/CSC.

4. PRODUCTS

a) Product Lookup

This is a simple search where you can lookup or search for a product by searching for its PIN/Serial number or part there-of


[Portal](#) / [Products](#) / [Product LookUp](#)

Product Lookup




PIN/VIN/Serial No:	<input type="text" value="BAT284"/>	Customer Fleet Name:	<input type="text" value="Customer Fleet Name (Optional)"/>
Name:	<input type="text" value="Customer Name (Optional)"/>	Branch:	<input type="text" value="Select..."/>
<input type="button" value="Search"/>			


Serial Number	PIN	3rd Party PIN	Model	Machine No.	Description	Manufacturer / Make	Customer Fleet Name	Action
BAT284	BAT284		B25A	401810	B25 6X4 STANDARD ADT	Bell Equipment		Select
BAT2840	BAT2840		B20B	406810	B20B SUPER TRUCK	Bell Equipment		Select
BAT2841			B20B	405886	CAB/CHASSIS.B20B	Bell Equipment		Select
BAT2842	BAT2842		B20B	405886	CAB/CHASSIS.B20B	Bell Equipment		Select


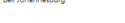
Once you have selected the “Select” Action, a new tab will open up showing details about the specific product




Product Configuration & Status
First Installation Date: Wednesday, December 13, 2023
Latest Installation Date: Wednesday, December 13, 2023
Standard Warranty End Date: Friday, December 13, 2024
Extended Warranty End Date: Sunday, December 13, 2026
Care Package End Date: --
Fleetmatic End Date: Wednesday, December 3, 2025

Unit Health
Machine Hours: 166.4
Fleetmatic: 
Service info:  Service Overdue
Campaign Status: 


Product Details
PIN: AEBAB32EE03511381
3rd Party PIN: --
Machine Number: A832E35
Machine Type: ADT
Model: B30E 6X6
Serial Number: BAT34041
Customer Fleet Name: 
Year of Manufacture: 2023




Contact Details
Customer Name: 
Dealer Name: 

General	Telematics	Installation Details	Transfer Log	Service History	Campaigns	Machine ID Info	Machine Config	CRM	Installation Approval Log	Attachments
Manufacturers: Bell Equipment										
Standard Warranty Hours: 9999.00										
Standard Warranty End Date: Friday, December 13, 2024										
Extended Warranty Type: Wet Drive Train & Hydraulics (WDT_HYD)										
Extended Warranty Months: 36.00										
Extended Warranty Invoice No: \$193										
Extended Warranty Notes: 6000 Hours or 36 Months Wet Drive Train & Hydraulics (WDT_HYD)										
Care Package Type: --										
Care Package Distance: --										
Care Package End Date: --										
Care Package Invoice No: --										
Dealer Warranty Hours: --										
Dealer Warranty End Date: --										
Dealer Warranty Months: --										
Emission Warranty Hours: --										
Emission Warranty End Date: --										
Emission Warranty Months: --										
Bin Lines: YES										
Aftermarket Attachments: NO										
Greedy Boards: NO										



Product Configuration & Status
First Installation Date: Wednesday, December 13, 2023
Latest Installation Date: Wednesday, December 13, 2023
Standard Warranty End Date: Friday, December 13, 2024
Extended Warranty End Date: Sunday, December 13, 2026
Care Package End Date: --
Fleetmatic End Date: Wednesday, December 3, 2025

Product Details
PIN: AEBAB32EE03511381
3rd Party PIN: --
Machine Number: A832E35
Machine Type: ADT
Model: B30E 6X6
Serial Number: BAT34041
Customer Fleet Name: 
Year of Manufacture: 2023

Unit Health
Machine Hours: 166.4
Fleetmatic: 
Service info:  Service Overdue
Campaign Status: 

1.Product Details

- A generic image of the selected product as well as the basic Product Details

2.Product Configuration & Status Indicators

- An indicator system is used to identify important information
- Green – Still within Warranty/CarePackage/Telematics – All Good
- Orange – Package Expiring within 30 Days or by Hours
- Red – Package already expired or Not Applicable

3.Additional details can be found by hovering over the data with your mouse cursor

Unit Health
Machine Hours: 166.4
Fleetmatic: 
Service info:  Service Overdue
Campaign Status: 

Unit Health Overview of the Current Health of this unit

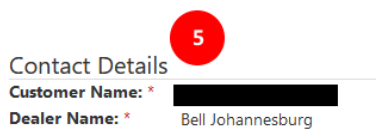


The screenshot shows the 'Unit Health' section. On the left, there are four items: 'Machine Hours: 166,4', 'Fleetmatic:' (with a green 'C' icon), 'Service info:', and 'Campaign Status:' (with a green checkmark icon). A red callout box labeled '4' points to the 'Fleetmatic' icon and the 'Campaign Status' icon. The callout box contains the following details:

Machine hours:	166,4
Last service hours:	2
Hours to next service:	-66,4
Next service name:	500

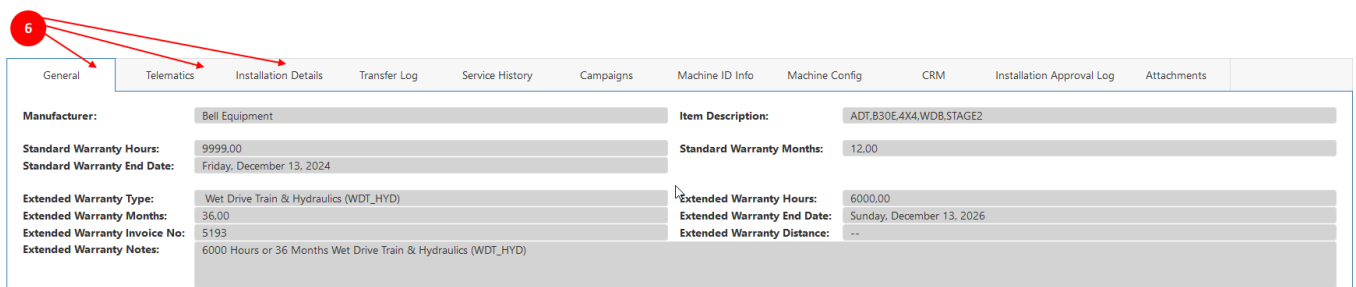
Hovering over the icons in the Unit Health Section will provide additional details on the specific area

- The C icon next to Fleetmatic shows us on hover that the product has a Classic Fleetmatic Package activated on it currently
- The RED spanner as seen above indicates a service overdue, hovering over that with your mouse cursor will show you that it is 66.4 hours past its service interval
- The green tick next to Campaign Status indicates there are no technical campaigns outstanding on this product – This will be an amber warning icon if there are outstanding technical campaigns.



The screenshot shows the 'Contact Details' section. A red callout box labeled '5' points to the 'Customer Name' field. The 'Customer Name' field is redacted with a black box. The 'Dealer Name' field is 'Bell Johannesburg'.

This section indicates the current Customer and Dealer/CSC responsible for the product at this point in time.



The screenshot shows the 'General' tab of the unit details. A red callout box labeled '6' points to the 'Manufacturer' field. The 'Manufacturer' field is 'Bell Equipment'. The 'Item Description' field is 'ADT.B30E.4X4.WDB.STAGE2'. The 'Standard Warranty Hours' field is '9999.00'. The 'Standard Warranty End Date' field is 'Friday, December 13, 2024'. The 'Extended Warranty Type' field is 'Wet Drive Train & Hydraulics (WDT_HYD)'. The 'Extended Warranty Hours' field is '6000.00'. The 'Extended Warranty Months' field is '36.00'. The 'Extended Warranty End Date' field is 'Sunday, December 13, 2026'. The 'Extended Warranty Invoice No.' field is '5193'. The 'Extended Warranty Distance' field is '--'. The 'Extended Warranty Notes' field is '6000 Hours or 36 Months Wet Drive Train & Hydraulics (WDT_HYD)'.

The Tabs on the Product Lookup Page will show more specific details that will be listed below

General: This shows general information such as The Manufacturer, warranty details etc

Telematics: This tab shows the product's current Telematics Details

- NOTE this will show details EVEN before a product is installed to the end customer, so as to provide data on a product's current location
- Click View Map to view the product's location on a map.

General	Telematics	Installation Details	Transfer Log	Service History	Campaigns	Machine ID Info	Machine Config	CRM	Installation Approval Log	Attachments
Package: Classic Longitude: 29.300800323486328 Punctuality: 100		Package Expiry Date: Wednesday, December 03, 2025 Latitude: -24.971799850463867 Machine Hours: 166.4								
View Map										

Installation Details: This tab will show the user the latest product installation details, as well as a tabular history of the products ownership/installation history.

- If you have installation rights you may see the “Go” button to view the actual signed installation documents, as well as a button Below this table to do a New Installation (See installation Process)

General	Telematics	Installation Details	Transfer Log	Service History	Campaigns	Machine ID Info	Machine Config	CRM	Installation Approval Log	Attachments	
Installation Date: Wednesday, December 13, 2023 Customer Name: [Redacted] Installation Type: New Installation History:		Created By: [Redacted] Dealer Name: Bell Johannesburg									
<table border="1"> <thead> <tr> <th>Installation Type</th> <th>Installation Date</th> <th>Customer Name</th> <th>Branch/CSC Name</th> </tr> </thead> <tbody> <tr> <td>New</td> <td>Wednesday, December 13, 2023</td> <td>[Redacted]</td> <td>Bell Johannesburg</td> </tr> </tbody> </table>		Installation Type	Installation Date	Customer Name	Branch/CSC Name	New	Wednesday, December 13, 2023	[Redacted]	Bell Johannesburg	Go	
Installation Type	Installation Date	Customer Name	Branch/CSC Name								
New	Wednesday, December 13, 2023	[Redacted]	Bell Johannesburg								

Service History: This tab shows the initial 1st QER or 1st service (See Service Tab)

- If the unit has Fleetmatic, we also currently display any Service History/Service indicator resets taken directly from the physical product via Fleetmatic

General	Installation Details	Service History	Campaigns	Machine ID Info	Machine Config	CRM
Hundred Hours Service: 99,00 Hundred Hours Service Remarks: [Redacted]		Date Last QER Done: Friday, January 09, 2015				
Service History						
Source	Service Name	Service Date	Service Hours Actual	Captured By	Job Card	Comments
Q	Q	Q	Q	Q	Q	Q
Fleetmatic	100	Wednesday, January 07, 2015	84.1999969	Fleetmatic System		
Fleetmatic	100	Monday, January 12, 2015	120.400002	Fleetmatic System		
Fleetmatic	500	Tuesday, February 10, 2015	494.100006	Fleetmatic System		
Fleetmatic	1000	Monday, March 30, 2015	1240	Fleetmatic System		

Campaigns: This tab lists ALL open/closed technical campaigns on a specific product.

- It is imperative that campaigns are dealt with as soon as possible

General	Installation Details	Service History	Campaigns	Machine ID Info	Machine Config	CRM
Campaign No	Campaign Description	Campaign Status	Priority	BEWSClaim Date		
2016/1007	ADT E# B18-B30E FAN SHROUD BN007579,BN010788,BN014865	Closed	Mandatory	2017-06-23		
2016/1012	ADT B25 & B30E CHARGE BLOCK TEST POINT FITMENT	Closed	Mandatory	2016-04-06		
2016/1020	ADT E# B18 TO B30,2304,2806 FUSE DECAL LAYOUT CHANGE	Closed	Mandatory	2016-07-30		

Machine ID Info & Machine Config: These Tabs house basic component information that is collected at the Factory when the unit is assembled.

Note: this is not currently maintained, and users should always confirm actual component part numbers on the physical machine

General		Installation Details		Service History		Campaigns		Machine ID Info		Machine Config		CRM	
Type				Part No				Serial No					
Engine:		ENGINE,OM926LA,240KW		BN005224				926 915 C 1071599					
Transmission:		TRANSMISSION,3500PR		BN007463				6520160790					
Front Axle:		AXLE,FRONT		BN000101				60012					
Middle Axle:		AXLE,MIDDLE		BN000102				60013					
Rear Axle:		AXLE,REAR		BN000103				60014					
Front Diff:		DIFFERENTIAL,H/D,#20		BN008774				141073					
Middle Diff:		DIFFERENTIAL,T/D,#20		BN008775				141074					
Rear Diff:		DIFFERENTIAL,H/D,#20		BN008776				141075					
Voac Block:		VALVE,HYD,MAIN		BN018110				1431-1237496-001					
Transfer Case:		10000 212 BN020349											

CRM Tab: This tab is designed to cater for communication around a particular unit or customer.

- There are TWO types of CRM Comments
 - 1 = Customer
 - Customer specific CRM comments are linked directly to the specific customer. They will appear on ALL units that belong to a specific customer. (If a product is transferred to a new customer the customer comments will not be displayed as they are related to the previous owner)
 - 2 = Machine
 - Machine specific comments are related to a particular machine, and they will be visible to any future owner of the machine.

To add a comment simply click Add comment.

CRM

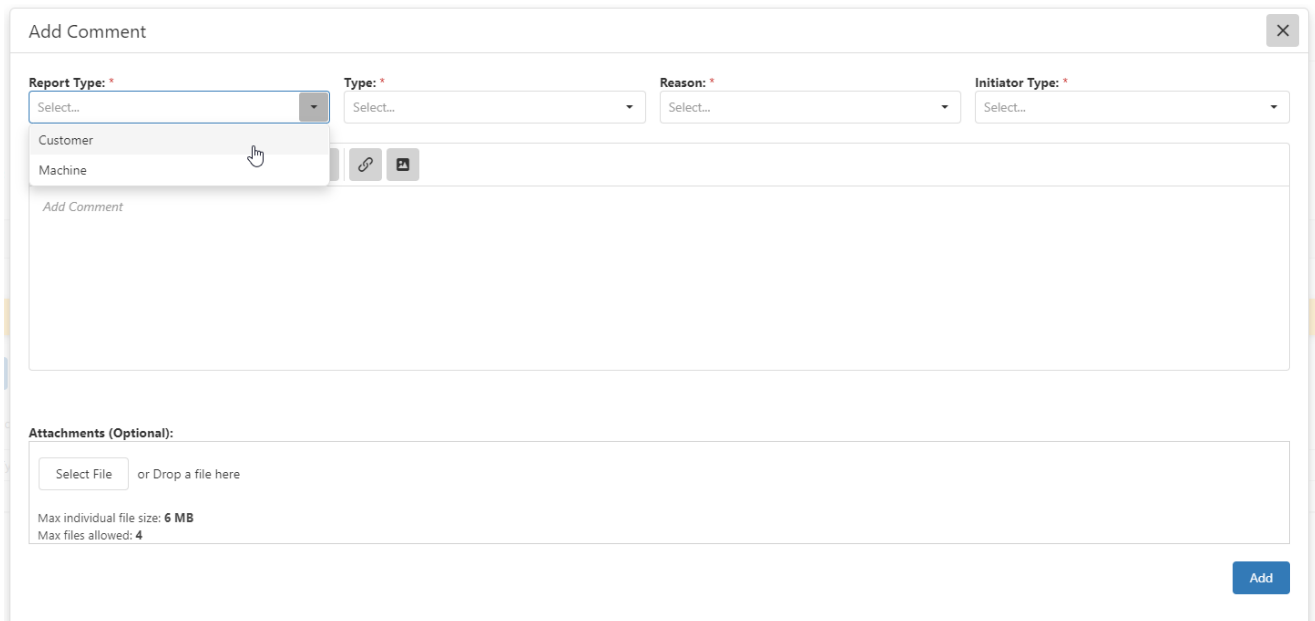
Add Comment

Drag a column header here to group by that column

Comment Report Type	Time Stamp	User Stamp	Comment Type	Comment Reason	User Type
Q	Q	Q	Q	Q	Q

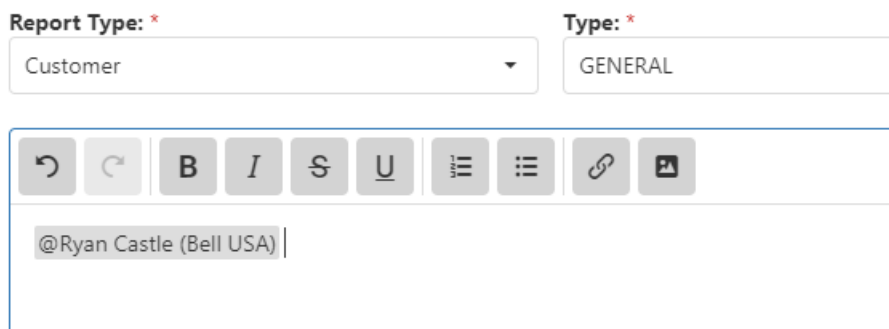
No data

In the Add comment popup, you now have the ability to select a report type, (Customer or Machine)
As well as select a pre-defined type, reason and initiator.
You can then capture any text comments as well as add any relevant attachments



The 'Add Comment' popup window features a title bar with a close button. Below the title bar, there are four dropdown menus: 'Report Type: *' (with a 'Select...' option and a dropdown arrow), 'Type: *' (with a 'Select...' option and a dropdown arrow), 'Reason: *' (with a 'Select...' option and a dropdown arrow), and 'Initiator Type: *' (with a 'Select...' option and a dropdown arrow). Below these dropdowns, there are two icons: a link icon and a document icon. Below the icons, there is a large text area for adding comments. Below the text area, there is a section titled 'Attachments (Optional):' with a 'Select File' button and the text 'or Drop a file here'. Below this section, there is a note: 'Max individual file size: 6 MB' and 'Max files allowed: 4'. At the bottom right of the popup, there is a blue 'Add' button.

Within the comment section you have the ability to mention any user who may have access to this machine. (To mention a user simply type '@' and select the user from the dropdown)
Mentioned users will receive a system generated email informing them that they have been mentioned in a comment.



The comment input section includes two dropdown menus: 'Report Type: *' (with 'Customer' selected) and 'Type: *' (with 'GENERAL' selected). Below these dropdowns, there is a rich text editor toolbar with icons for undo, redo, bold, italic, strikethrough, underline, bulleted list, numbered list, link, and image. Below the toolbar, there is a text input field containing '@Ryan Castle (Bell USA)'.

b) Product Transfer

If a product has been sold or moved to another customer (outside of your network)

IE: You have not processed this sale, but the product has been sold privately to another customer, this gives you the option to allocate this product to the new customer.

Note: This may require Warranty Approval, as there are different warranty policies applicable to different regions, and there are cross-border agreements that may need to be considered here. The system will determine this based on pre-defined rules that have been built into the system.

[Portal](#) / [Products](#) / [Product Transfer](#)

[Transfer History](#)

Product Transfer

PIN/VIN/Serial No: BAT28408

Customer Fleet Name: Customer Fleet Name (Optional)

Name: Customer Name (Optional)

Branch: Select...

Search

Serial Number	PIN	3rd Party PIN	Model	Machine No.	Description	Manufacturer / Make	Customer Fleet Name	Action
BAT28408	AEBAB45EK01306338		B45E	A845E13	ADT.B45E.STAGE3A.WDB	Bell Equipment	LTRSB45E#6338	Select

Product Details

PIN: * AEBAB45EK01306338

Machine No: A845E13

Serial Number: BAT28408

Model: B45E

Transfer

Once you have selected the machine and clicked Transfer you will be required to complete some details in the popup.

The Transfer To CSC is the CSC/Branch you will be transferring this unit to.

Note: If you do not know the actual customer, you will be defaulted to “Branch Default” – This transfers the unit to an “Unknown Customer” at the branch, and is used to notify the respective branch of the unit now assigned to them.

Transfer To CSC: *

Bell Empangeni

Transfer To Customer: *

☒ Branch Default ☐ Other Customer

If you know the customer, and have access to the branch, you can select “Other Customer” – This allows you to select the appropriate customer related to the branch

Transfer To Customer: *

☐ Branch Default ☒ Other Customer

Select Customer:

Select...

Customer Name

Q test

Test 31 Jan RB

Test_BESEA Org_Melissa Org

Test_BongL4

Complete comments section and select submit.

Selecting Transfer History, will show you a history of the latest transfers in your CSC/Branch. (This will also indicate the approval status, - the sample below was automatically approved based on the built in logic – Comments added by the warranty team should they need to approve will be visible here as well)

[Portal](#) / [Products](#) / [Product Transfer](#) / [Transfer History](#) / [Transfer Details](#)

Transfer Details

Status: *

Approved

Serial Number:

BAT28408

New CSCS: *

Bell Equipment United Kingdom

Date Submitted: *

Monday, January 15, 2024

Comments:

SOLD TO [REDACTED]

Transfer Type: *

Product

Current CSCS: *

User:

[REDACTED]

Customer:

[REDACTED]

Transfer Approval Details

No Approval Record

c) Package Renewals/Additions

This allows you to update, add or renew current packages that are applicable to a specific product.

IE: The customer currently has Warranty (That was captured when they installed the product), but now they want to Add on Extended Warranty.

As above simply search for the PIN/Serial number or part there-of and select the correct product by clicking the “Select” Action

[Portal](#) / [Products](#) / [Package Renewals/Additions](#)

Package Renewal/Addition History

Package Renewals/Additions

PIN/VIN/Serial No: BAT28408

Customer Fleet Name: Customer Fleet Name (Optional)

Name: Customer Name (Optional)

Branch: Select...

Search

Serial Number	PIN	3rd Party PIN	Model	Machine No.	Description	Manufacturer / Make	Customer Fleet Name	Action
BAT28408	AEBA845EK01306338			A845E13	ADT,B45E,STAGE3A,WDB	Bell		Select

This will allow you to select the renewal/addition type (Extended Warranty/Care Package/Telematics)

- You can then capture the appropriate details for the required Type (See Installation Process for details)

New Package Renewal/Addition

Serial Number:	BAT28408	PIN: *	AEBA845EK01306338	Machine No.:	A845E13
Package Renewal/Addition Type: *	Telematics				
Fleetm@tic Package: *	Extended Warranty Care Package Telematics				
Start Date: *	Monday, November 12, 2018		End Date: *	Thursday, November 12, 2020	
Attachment:	<div>Select File or Drop a file here</div>				

This Renewal/Addition will follow the same approval process as a new installation, and will be sent to the appropriate team (Warranty, CarePackage or Telematics) to approve the new addition or change to the specific product.

5. CUSTOMERS

This menu allows you to search or create customers linked to YOUR CSC/Branch.

To create a new customer select “New Customer” and complete the required customer details (Note- Users are able to create customers at time of installation via the installation process as well)

Portal / Customers / Customers Lookup / New Customer

Customer Information

Customer Name: *	Branch: *
<input type="text"/>	<input type="text"/>
Parent Customer / Owner (If Applicable):	Account Owner:
<input type="text"/>	<input type="text"/>
Phone 1:	Website:
<input type="text"/>	<input type="text"/>
SAP Account Number:	VAT/Tax Number:
<input type="text"/>	<input type="text"/>

Address Information

Billing Street:	Shipping Street:
<input type="text"/>	<input type="text"/>
Billing City:	Shipping City:
<input type="text"/>	<input type="text"/>
Billing Postal Code:	Shipping Postal Code:
<input type="text"/>	<input type="text"/>
Billing Province:	Shipping Province:
<input type="text"/>	<input type="text"/>
Billing Country:	Shipping Country:
<input type="text"/>	<input type="text"/>

Comments

Comments

Add

Once you have added a customer you can search for the customer, and update its details as well as add contacts to this specific customer

Name:

Customer Name	Phone 1	SAP Account Number	Action
Q	Q		
testRC			Edit Details
Test_BESEA Org_Melissa Org			Edit Details
Sales_Admin_Access_Test_Sifiso			Edit Details

Selecting “Edit” places this customer in EDIT mode, and allows you to update all relevant details and customer contacts

Billing Postal Code:	Billing Province:	Shipping Postal Code:	Shipping Province:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Billing Country:	Shipping Country:		
<input type="text"/>	<input type="text"/>		

Update

Customer Contacts

Full Name	Email	Mobile Phone	Job Title	
RyanTest	test@test.com	123		Edit
Buyer's Full Name	buyer@customerdomain.com	0000000000	Chief Buyer	Edit

This view also has CUSTOMER Reports

- a. These reports are referenced in the Product Lookup section of this manual, and all reports generated for an individual customer will be available here, as well as you will have the option to create a customer report here.
- b. These are visible on the product lookup for ALL products allocated to the customer at this time.

IE: Customer may be a self service customer, and not want you to contact them with regards to services, etc for ALL their products. – If you add a customer comment here or on a product (Product Lookup Section Above) they will be visible on ALL products owned or allocated to this specific customer

The screenshot shows a web interface for 'Customer Reports'. At the top, there's a yellow header bar with the text 'Customer Reports'. Below it is a blue button labeled 'Add Customer Comment'. Underneath the button is a text prompt: 'Drag a column header here to group by that column'. Below this is a table with five columns: 'Time Stamp', 'User Stamp', 'Comment Type', 'Comment Reason', and 'User Type'. Each column has a search icon (magnifying glass) and a dropdown arrow. The table is currently empty.

To add a comment select “Add Customer Comment”

- c. You can now select the Type, Reason and Initiator Type of this individual report.
- d. Add comments and /or attachments and select Add

The screenshot shows a modal dialog box titled 'Add Customer Comment'. It has a close button (X) in the top right corner. The dialog contains several fields: 'Report Type: *' with a dropdown menu showing 'Customer'; 'Type: *' with a dropdown menu showing 'Select...' and a list of options (QUOTE, VISIT, PHONE CALL, E-MAIL, GENERAL, ACTION REQUIRED, PARTS INSTALLATION, ALTERATION/MODIFICATION, DOCUMENTATION); 'Reason: *' with a dropdown menu showing 'Select...'; and 'Initiator Type: *' with a dropdown menu showing 'Select...'. Below these fields is a text area for 'Add Comment' with a rich text editor toolbar (undo, redo, bold, italic, strikethrough, underline, list, link). At the bottom, there's an 'Attachments (Optional):' section with a 'Select File' button and a text prompt 'or Drop a file here'. Below this, it says 'Max individual file size: 6 MB' and 'Max files allowed: 4'. A blue 'Add' button is in the bottom right corner.

6. SERVICES

a) First Service

This section allows you to generate the First Service record required by warranty. Simply Search for your Product by Pin/Vin or part thereof and select the action “Submit”

Portal / First Service

History

Generate First Service

PIN/VIN/Serial No:	BAT28408	Customer Fleet Name:	Customer Fleet Name (Optional)
Name:	Customer Name (Optional)	Branch:	Select...
<input type="button" value="Search"/>			

Serial Number	PIN	3rd Party PIN	Model	Machine No.	Description	Manufacturer / Make	Customer Fleet Name	Action
BAT28408	AEBAB45EK01306338		B45E	A845E13	ADT.B45E.STAGE3A.WDB	Bell Equipment	LTRSB45E#6338	Template Submit

Note: No Data will be returned if the product has not been installed, or has an installation in progress, so please ensure your product has been installed before creating the First Service Record.

Once you have searched for the product and selected “Submit” you can fill in details such as Technician Name, Jobcard Number, Machine Hours and date, then attach a copy of the manual 1st Service QER (Available on the Aftermarket website)

Serial Number	PIN	3rd Party PIN	Model	Machine No.	Description	Manufacturer / Make	Customer Fleet Name	Action
BAT28408	AEBAB45EK01306338		B45E	A845E13	ADT.B45E.STAGE3A.WDB	Bell Equipment	LTRSB45E#6338	Template Submit

Quality Evaluation Details

PIN: *	AEBAB45EK01306338	Job Card Number: *	JOB100
Description:	ADT.B45E.STAGE3A.WDB	Machine Hours: *	100
QER Type: *	1st Service Report	Date QER Done: *	QER Date
Technician Name: *	John Doe	Attachment:	<input type="button" value="Select File"/> or Drop a file here Allowed file extension: .PDF Max file size: 6 MB

Submit

This then gets submitted to the warranty team, who will review this entry and record this data against the specific product

7.HELP MENU

Should you have any issues with Support Portal functionality or data you can make use of this support tab to alert one of our team members who can address this and revert back to you.

Submit a Support Request

Note

In order for us to better assist and to expedite the resolution process please provide the following in your request:
1.The full URL (Web Link) used to when you received the issue.
2.Describe what the user was attempting to do on the system at the time they encountered the issue.
3.Provide a full description of the problem, including full screenshots of any error messages that may appear.
4.Please specify whether you were able to perform the task previously; if so, indicate when it last worked.

User Details

User:

Phone:

Email:

Training Account

Details

Request Category:

Installations

<>

B

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🖼️

Add Comment

Upload File:

Select File or Drop a file here

Max file size: 6 MB

Submission of this form and your details are subject to Bell Equipment's Privacy Policy and Terms & Conditions that can be viewed here

☐ I agree to Bell Equipment's Privacy Policy & Terms and Conditions

An alternative to this Help Menu is for you to email dealeritsupport@bellequipment.com

In order for us to better assist and to expedite the resolution process please provide the following in your request:

- 1.The full URL (Web Link) used to when you received the issue.
- 2.Describe what the user was attempting to do on the system at the time they encountered the issue.
- 3.Provide a full description of the problem, including full screenshots of any error messages that may appear.
- 4.Please specify whether you were able to perform the task previously. If so, indicate when it last worked.

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Updated: 16 February 2024