

CPQ Workflow Below:

Step 1:

- Go to CRM, open the orange tab, and select “Standalone Equipment Opportunity”
- Navigate to your customer and create an opportunity

The screenshot shows the Toyota Industrial Equipment CRM interface. The top navigation bar includes the Toyota logo and the text 'INDUSTRIAL EQUIPMENT'. Below this is a secondary navigation bar with links: Back, Forward, History, Favorites, Personalize, View, and Help. The main navigation area features several tabs: Pre-Sales, Pre-Sales (NA), Account Mgmt, Account Mgmt, Master Data, Master Data, Marketing, Marketing, Activities, and Activities. The 'Pre-Sales' tab is selected, and the 'Standalone Equipment Opportunity' option is highlighted in the left-hand navigation menu. A green callout box with the text 'click here' points to this option. The main content area displays the 'Standalone Equipment Opportunity' form, which includes fields for Quote Status, CPQ Q, Opportunity, Description, Prospect, and Opportunity ID. A red banner at the top of the form area states: 'CRM and CPQ will not be available from Friday 11/17/2023 09:00 PM ET to Sunday 11/19/2023 09:00'. The form also includes a 'Maximum Number of Results: 100' setting and a 'Save Search As' button.

Step 2:

- Create a new opportunity, scroll down the page to the Professional Services section, and select MyInsights® Aftermarket.
- Add to Quote and select hardware and subscription options for the quote
 - **Hardware quantity** will provide the price for the total number of kits you quote.
 - **Subscription quantity** will be the **number of months** you want the subscription term.

CONNECT TOYOTA

Quote #013055628 / Revision 1 Save Quote Add Item External Repairs

Quotation Involved Parties Notes Documents

Status: Edit Date Created: 07/23/2025 Date Modified: 07/24/2025 Not for Forecast: ☒
 Quote Type: MyInsights Aftermarket Effective Date: 07/14/2025 Closing Date: 08/30/2025 Show Ship to on Doc: ☐
 Revision: Revision 1 (Active) Show PO on Signature: ☐

Quote Header Fields

Org. Opportunity ID / Quote ID: Opportunity Start Date: 07/14/2025
 Opportunity ID: 0070001333 Reason:
 Reference No.: Quoted Quantity:
 Opportunity Description: Net Ordered Quantity: 0
 Customer PO: Factory Ship to: Dealer
 Sales Prospect: Chairman Foods, LLC 00302751 FIPS County: Davidson 37
 Contact Person: Chris Bradley FIPS State: TN 47
 Employee Responsible: Seabarth KS Account Classification:
 SIC: 8321 Conquest Flag: No
 Stock Truck #: 0000000000 Language:

Professional Services

Professional Services: MyInsights Aftermarket Add to Quote Validate Delete Items from Table

Part Number	Quantity
MYINS-PLUS	0
MYINS-PLUS	0
MYINS-PLUS	0

Quote #013055701 / MASTER Save Quote 1-Click Document Generation Add Item ...

Quotation Involved Parties Notes Documents Add Row Download Excel File

Product Description	Quantity
MyInsights Plus	60
MyInsights Kits	1

Products Delete All Items Cart to Table

Item	Quantity	Unit Price	Net Cost	Crcy	Notes
1 MYINS-PLUS MyInsights Plus	60	\$ 10.95	\$ 657.00	USD	
2 MYINS-BUND MyInsights Kits	1	\$ 0.00	\$ 0.00	USD	

Step 3: An instruction page will be attached to every quote, providing your customers with guidance on how to sign up for the subscription. Customers will sign up directly for their subscriptions in their MyToyota Portal. See example: **PDF attachment (Subscription Order)**