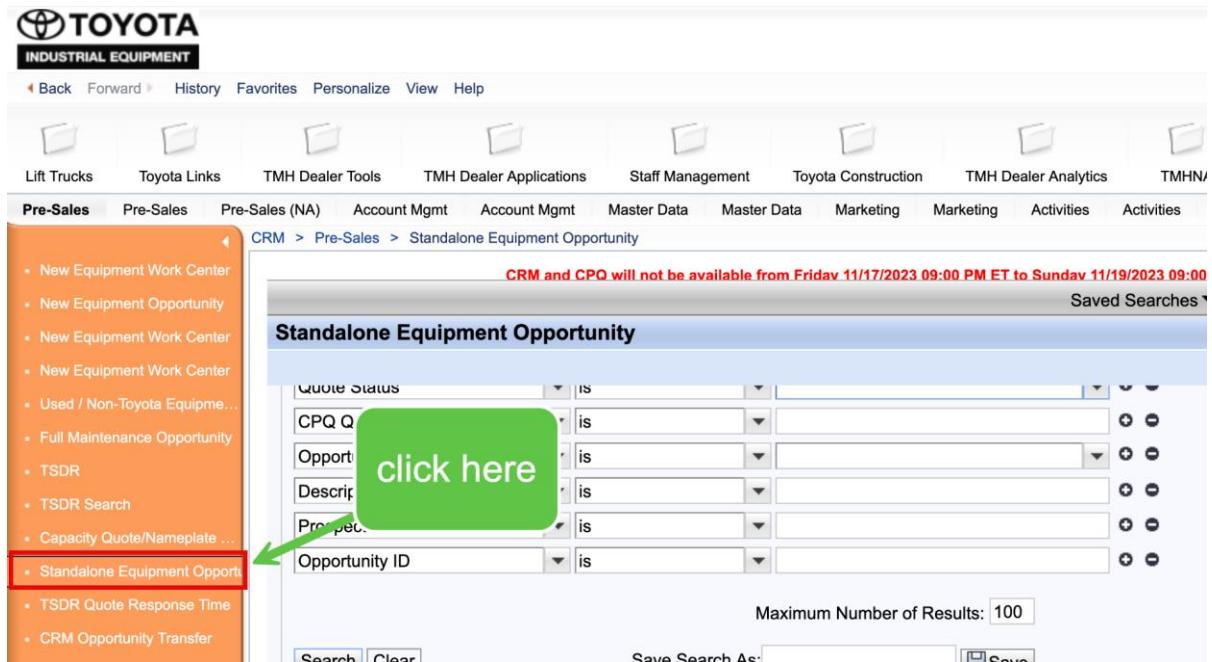


## CPQ Workflow Below:

### 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 links for Back, Forward, History, Favorites, Personalize, View, and Help. Below the navigation is a toolbar with icons for Lift Trucks, Toyota Links, TMH Dealer Tools, TMH Dealer Applications, Staff Management, Toyota Construction, TMH Dealer Analytics, and TMHNA. The main menu bar has tabs for Pre-Sales, Pre-Sales, Pre-Sales (NA), Account Mgmt, Account Mgmt, Master Data, Master Data, Marketing, Marketing, Activities, and Activities. The current path in the breadcrumb navigation is CRM > Pre-Sales > Standalone Equipment Opportunity. A message at the top of the page 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 main content area is titled "Standalone Equipment Opportunity". It features a search form with fields for Quote Status, CPQ Q, Opport, Descrip, Proprie, and Opportunity ID. A green callout box with the text "click here" is positioned over the Opportunity ID field. A green arrow points from the "click here" box to the "Opportunity ID" field. Below the search form are buttons for Search, Clear, Save Search As, and Save. A note at the bottom indicates a maximum of 100 results.

### 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

Quote #013055628 / Revision 1

Quotation Involved Parties Notes Documents

Date Created: 07/23/2025 Date Modified: 07/24/2025

Quote Type: MyInsights Aftermarket

Effective Date: 07/14/2025 Closing Date: 08/30/2025

Revision: Revision 1 (Actual) +

Quote Header Fields

Org. Opportunity ID / Quote ID	
Opportunity ID	0070001333
Reference No.	
Opportunity Description	test
Customer PO	
Sales Prospect	Chairman Foods, LLC
Contact Person	Chris Bradley
Employee Responsible	Seekarth KS
SIC	6321
Stock Truck #	0000000000

Opportunity Start Date	07/14/2025
Reason	
Quoted Quantity	
Ordered Quantity	0
Factory Ship To	Dealer
FIPS County	Davidson 37
FIPS State	7B47
Account Classification	
Conquest Flag	No
Language	

Professional Services

Professional Services	MyInsights Aftermarket
Part Number	MYINS-PLUS
	MYINS-PLUS
	MYINS-PLUS

Add to Quote Validate Delete Items from Table

Add Row Download Excel File

?

Quote #013055701 / MASTER

Quotation Involved Parties Notes Documents

Save Quote 1-Click Document Generation Add Item ...

Product Description Quantity

MyInsights Plus	60
MyInsights Kits	1
MyInsights Plus	
MyInsights Plus Compliance	
MyInsights Display	
MyInsights Kits	
MyInsights Kit + Display	

Add Row Download Excel File

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	

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**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)**