

## How To's

### Pre-Register Samples

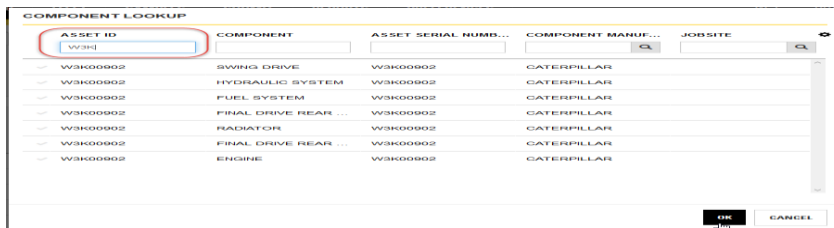
Step 1: Navigate to the “Submit” page using the main menu.

Step 2: Select the magnifying glass icon under **Search or Add Component** to open a lookup window.

Step 3: Enter the Asset Serial Number, Asset ID or Manufacturer for the equipment you will be sampling.

Note 1: If any of these fields are not present in your table, they can be added using the gear icon in the upper right corner. Refer to the Help Document titled “Configure Your Pages” for more details.

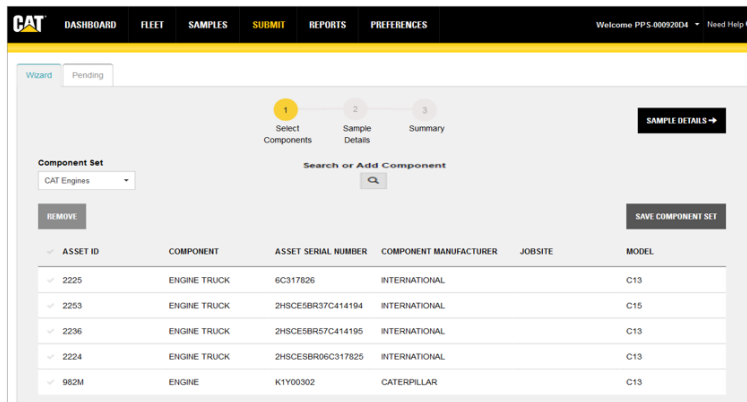
Note 2: If the equipment cannot be found, please navigate to the Fleet page using the main menu to **Add** to your equipment list.



Step 4: Click on the checkmarks on the left side of the compartments you will be sampling and select OK.

Repeat Steps 3 & 4 for any additional equipment.

When all samples to be pre-registered have been selected, the Submit page will contain a list similar to the one below.



Samples can also be added to this list:

1. Selecting an existing set from the **Component Set** drop-down list located above and left of the table. This selection box will only be available for users who have previously saved a Component Set
2. Via the submit samples feature in the *Asset Details* view of the *Fleet* page.
3. Via the submit samples feature in the *Components* tab of the *Fleet* page.

Step 5: Select the **Sample Details** button to proceed to the next step.

Step 6: Enter the sample information into the electronic labels displayed on the screen.

The dark gray box contains information related to the equipment and will be used for all compartments.

The light gray boxes contain information for individual compartments/samples.

The screenshot shows the 'Sample Details' step of a sample registration wizard. The interface includes a navigation bar with 'CAT', 'DASHBOARD', 'FLEET', 'SAMPLES', 'SUBMIT', 'REPORTS', and 'PREFERENCES'. The main area shows a 'Wizard' with three steps: '1. Select Components', '2. Sample Details', and '3. Summary'. The 'Sample Details' step is active, displaying a form with fields for 'Sampled Date', 'Asset Meter', 'Dealer Branch', 'Jobsite', 'Location', 'PM Interval', 'Shop Job', 'Previous Meter', 'Sample Label No', 'Meter On Fluid', 'Fluid Brand', 'Fluid Weight', 'Fluid Change', 'Makeup Fluid Units', 'Makeup Fluid', 'Notes', 'Priority', 'Fluid Type', and 'Kidney Loop'. A 'SAVE TO DRAFT' button is highlighted with a red box.

Step 7: Select the **Submit Samples** button to proceed to the next step.

A summary screen showing the sample registration information submitted will be displayed. All samples displayed in the **Summary** have been successfully submitted to the lab. Users will receive an error message if samples are not successfully submitted.

Users can then print labels to submit using the **Print Labels** button.

**Note:** If printed labels will not be submitted with the samples, the Bottle Number or Label Number provided by the dealer, **must** be populated in the **Sample Label No** field for the pre-registration information to be retrieved by the lab.

Pre-registered samples can be reviewed, modified and deleted on the **Pending** tab.