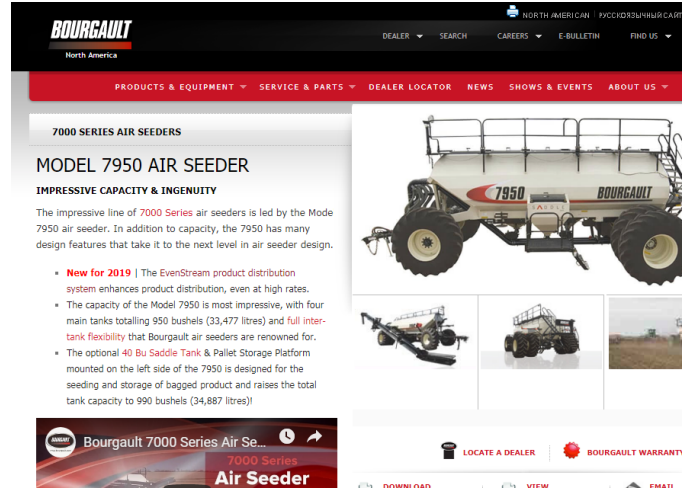


## Part 1 – Sale & Customer Training

### Step 1 – Gathering Facts & Offer Information

#### Timing: Quoting with Potential Customer (dealership office)

- Identify Customer Needs* - Gather pertinent information from the customer: ie. land base, cropping plans, seeding goals ,etc.
- Discuss Product Features* - Review the features/options available on applicable equipment and how they will contribute to the goals set:
  - Refer to the latest **Bourgault Product Catalogue**;
  - Detailed information on specific features and options are available at [www.bourgault.com](http://www.bourgault.com). An index on the left side of the main page provides an outline describing the features & options available. Click on links of the features or options that are of greatest interest to the customer.
  - Links to feature and option details are also available on the **Bourgault Wholegoods Pricer** for your convenience when working on a quote with your potential customer. (Online Sales Portal to be released in 2020 model year)



Encourage the customer to visit the [Bourgault YouTube channel](#) (search for “BourgaultVideo” in YouTube). This extensive library provides a wealth of promotional and service videos.

- Promote Service & Support* – Bourgault has built an outstanding reputation by providing dealer & customer support. Invite the customer to do price comparison on used Bourgault equipment to competitors. Suggest the customer to talk with neighbors or with some of your current Bourgault owners if the customer is unfamiliar with Bourgault. Show your customer the [Customer Service Centre](#) located in the Bourgault website, and how it will provide them with step-by-step instructions on equipment setup and operation. Other considerations for building your Bourgault customer base are [Bourgault factory tours](#), and the [Seeding is Believing field day](#) held the first Thursday of July.

### Step 2 – Conformation of Sale

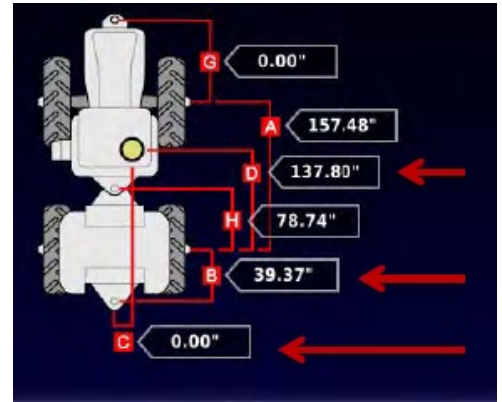
#### Timing: Completion of Sale (dealership office)

- Product Familiarization* - Encourage the customer to become more familiar with the specific product and features they have purchased. Again, direct them to the online [Customer Service Centre](#) and encourage each intended operator to go through the documents and videos provided there. Point out that making themselves familiar with the setup and operation of each feature/option prior to receiving the unit will pay off at the customer clinic and spring startup. Instructions on the site are organized into segments, allowing operators to learn at their own pace.
- Customer Information* - Request the customer to gather and send in the following information that will be required by your shop and for you to help them start the X35 setup. In order to save time for you, your shop and the customer, have them send in these specifications prior to the next visit.

## Road Map to a Successful Startup – Dealership Copy

- What tractor they will be using and the brand of receiver being used,
- The receiver location dimensions (refer to red arrows on diagram),
- The list of field names for the spring,
- The list of products and intended rates for spring use,

Inform the customer they will require an I-pad or tablet for the X-tend feature, and to bring it to the next visit.



- **Communicate with Shop Technicians** – Sharing the new unit configuration with your shop staff is key to providing top customer satisfaction and minimal issues for your dealership.
  - A complete list of unit configuration and options is needed to perform a successful PDI, system set-up, and functional test.
  - Mistakes here may result in the need to re-configure the system, creation of new profiles, rush ordering of missed parts and additional service calls resulting in added costs to your dealership and reduced customer satisfaction.
- **Arrange Unit Setup with Tractor** - Strongly recommend that the customer brings his tractor in. Complete setup with the customer's tractor typically provides the best results and most trouble free startup. If this cannot be arranged, inform the customer to complete the following steps:
  - Check the hydraulic high pressure relief of the tractor to ensure that it is set at 3100 PSI or greater;
  - Hook up the In-Cab wiring harnesses, mount the X35, camera monitor, switchbox and mount for a tablet/I-pad - the operator should refer to Section 11 in the operator's manual, or [Section A. First Time Setup](#) in the Customer Service Centre for guidance;
  - Connect the GPS harness from the tractor receiver to the X35, set up the NEMA outputs, set the BAUD rate to match the X35 and verify that the tractor is outputting to the X35. If your dealership is not performing this task, remind the customer that a specific harness will need to be ordered. He can find the part number from the applicable GPS Setup document located in the [Customer Service Centre](#) for guidance.

Working closely with the shop will reduce mistakes by the customer and contribute to a trouble-free startup.

### **Step 3 - Hands-On with the X35**

#### **Timing: Follow-up meeting with the customer (dealership office)**

Sit down with the customer to go through the following list of actions:

- **Operator's Manuals** - Review the operator's manuals with the customer. These include but not limited to the air seeder manual, X35 manual, and minimum fan speed manual. Point out some of the critical information sections including calibration, section control timings, and product maintenance. These manuals contain all the information needed for the setup and operation of the seeding system.
- **Quick Reference Guides** - Review each of the applicable quick reference cards with the customer. Ask them to keep these handy in the tractor cab. Note that these guides can be accessed and printed from the website if lost.
- **Co-Pilot His First X35 Experience** - Plug in the Customer's X35 and take as much time as the customer/operator needs to become comfortable with the features he wants to use. This step is much more productive if the customer has reviewed the videos and documents available on the Customer Service Centre. This is also an excellent opportunity to go through several important setup operations:
  - Enter his field names & setup a customized product list in advance of seeding;
  - Review the Quick Start setup and customize the actions to his needs;

## Road Map to a Successful Startup – Dealership Copy

- Extend Setup – download the X-tend App on the customer’s tablet & smart phones and go through setup.
- Show the options for setting up the keypad and stick the decals on;

Refer to [Section A. First Time Setup](#) in Customer Service Setup for these and other X35 features & options.

**Operator Access** – Determine with the customer the best access level they should start with on the X35;

- A. *Easy* – Less clutter on screen – limits operator of multiple settings;
- B. *Standard* – Adds more settings for operator – but still limited on settings;
- C. *Expert* – Gives full access to almost all areas of the monitor.

**Note:** The Expert level allows you to go into the User Controls section where you can tailor the settings for the Easy and Standard user levels to access only what the customer will require. Removing unnecessary icons will reduce clutter on the screen for the operator(s). Refer to Standard User Settings in [Section A. First Time Setup](#).

**Minimum Fan Speed** - Advise the customer about their fan options and show them how the fan speed charts are used based on fan option/s, model of drill, width of drill, # of primary ports.

- As an example, pick application rates for at least one crop scenario (it should have more than one product going down a run) and determine the correct fan speed using the applicable chart.
- Inform the customer that 7000 fan charts can also be found online in the “Bourgault [Customer Service Centre](#)” section.

**Take It Home** - If practical, have the customer to take the X35 monitor w/power supply home with them and encourage him to take some time to become more comfortable with its operation. The X35 can be set up in a simulation mode to provide some virtual air seeder inputs (refer to [Section D – General Operation](#) to find instructions on setup). If this is not practical, encourage the customer to review the videos and documents on the X35 prior to the customer clinic if they have not done so yet.

**Preparation for the Customer Clinic** - The X35 provides the farmer with excellent control and monitoring of the air seeding system, thus it is not possible to absorb all the setup and operation information in one sitting.

- Encouraging your customer to invest some time in the [Customer Service Centre](#) prior to the Bourgault Customer Clinic will vastly improve his learning curve at the clinic.
- Suggest that they jot down questions ahead of time to bring to the clinic to bring up with the training staff.

The more the customer puts towards learning prior to the customer clinic, the more benefit they will realize from the customer clinic. The payback will be reduced stress for their operation and your dealership.

**Remote Support Setup** - Set the monitor up for remote support with the Topcon ID of a computer at the dealership that would be used for this purpose. Refer to [Section A. First Time Setup](#) in Customer Service Setup.

**Bourgault On-Line Parts System** - Inform your customer that they can go online through the Customer Service Centre to access [Bourgault EzParts](#). They can find parts information or reference operator’s manuals for their units.

**Export Settings to USB** – have the customer export his settings to a USB stick and store in a safe location. This will be a complete backup of his monitor, which can be retrieved if his X35 is damaged or information is lost. Refer to Inventory Management in [Section A. First Time Setup](#).

## Part 2 – PDI & Delivery

### Step 4- Unit Set-up and Testing

**Timing: Prior to Delivery to Customer (dealership location)**

- Complete Required PDIs* – Ensure dealer technicians have performed the appropriate PDI's. PDI forms are available from the Bourgault website, under [Dealer>Pre Delivery Inspection Forms](#).
- Functions Test* – Perform the appropriate functional test on the system. Refer to the unit configuration information provided by the salesman so it is tested as per the customer specifications. Refer to [Section B. Functional Test](#) for instructions.
- Warranty Registrations* - Units have the warranty registrations properly completed prior to delivery to the customer.
  - The customer must be informed of their responsibilities;
  - The proper forms should be signed by the customer;
  - Registration has been submitted to Bourgault Industries via the [online warranty program](#).

### Step 5 - Initial Start-up Orientation

**Timing: Unit is being delivered to the customer (Customer's Farm)**

- Set a Date* - Arrange to meet with the customer/operator to perform the initial startup. Ask the customer to have all who will be running the unit to be present at the initial startup.

**IMPORTANT** - At this point there should NOT be any product in the tanks. The walk-around is to be done prior to seeding when time can be taken for a thorough process.

- Walk-Around* - Start the initial startup with a Walk-Around with the customer(s) using the list provided below.
  - *Customize Walk* – point out specific options & features based on the customer's configuration & plans;
  - *Documentation* - Refer to the operator's manuals & quick reference guides during the walk-around to encourage their use. Suggest the operators to bookmark the [Customer Service Centre](#) in their smart phones for easy reference.
  - *Special Tools* - Familiarize the customer with any extra components, parts and tools sent along with the drill & tank and their intended use.

This process is a critical aspect of customer education and satisfaction.

#### **Air Drill Walk-Around**

- PHD, XTC, or ICD opener* - familiarize customer with setup & adjustments
- MRB or MRS opener* - familiarize customer with setup & adjustments
- Safety Isolation valve* – Familiarize the customer on location & proper uses.
- Hi-Float (HF) Setup* – Familiarize the customer on valve block location & HF ball valve.
  - Instruct on proper operating pressure and positioning of the lock-out valve.
- Opener Hydraulic Circuit* – Familiarize the customer on valve block location, pressure setting & location of lockout valves. If equipped with the row spacing option, advise customer of location of these valves & the proper uses of the row spacing option.
- Inner wing down pressure setting (where applicable)* – confirm proper setting and when to adjust.
- MRB or MRS Circuit* – Familiarize the customer with valve block location, pressure setting & location of lockout valves. If equipped with the “Momentary Isolation Switch” option, advise customer of proper uses.

## Road Map to a Successful Startup – Dealership Copy

- QDA Equipped Drill Depth Adjust* – Familiarize the customer with location of the manual position valve & run through a depth adjust process.
- QDA Equipped Drill Leveling “Frame”*:
  - *QDA Shims* – point out the special red shims which are factory set and not to be adjusted by the customer.
  - *Proper tire inflation* – point out the tire inflation decals and importance of maintaining correct pressure.
- Air Seeder Kit* - Perform a visual inspection of the air-kit on the drill:
  - *Inspect Coupler Plate* – verify rubber gaskets are seated properly.
  - *Inspect 2.5” hose routing* – point out the importance of correct routing from the primary manifold to the coupler plate.
  - *Inspect tertiary hoses to openers and banders* – discuss importance of maintaining correct hose length, avoiding pinch points, and hoses with upward slopes during seeding.

### **Air Seeder Walk-Around**

- Camera Setup* – proper function – review with customer/operator
- Integrated Brakes* – proper function & bleeding intervals.
- Fluctuating Meter RPM* – Inform customer of adjusting hydraulic metering circuit back pressure if ever encountering meter rate fluctuations. Refer to Section 12 - Troubleshooting in operator’s manual.
- Primary Manifold Alignment* - Confirm that the primary manifold orientation alignment is set correctly with S-pipes & J-pipes. Verify that the distribution system is in good working order and nothing is loose.
  - Refer to **Main Transfer Bellows Preload Setting** under Service & Maintenance in the 7000 Series operator’s manual for instructions. Refer to Section 12 – Troubleshooting
  - Emphasize the importance of daily inspections for proper alignment
- Customer Functional Test* - Perform an in-field functional test with the customer(s). Refer to [Section B. Functional Test](#) in the Customer Service Section for instructions.
  - Have the customer follow through the test in a step-by-step manner and understands the process.
  - Verify that all features are fully functional.
- Simulated Seeding* – The last important step to a successful startup is for the customer to conduct a Simulated Seeding exercise prior to the actual startup date. A Simulated Seeding guideline is available for download in the [Customer Service Centre](#).

**Prior to leaving the customer/operator on his own take a few minutes to walk around the tank & drill pointing out maintenance items on the equipment and answer any last questions your customer may have.**

## **Bourgault Customer Centre**

Encourage your customers to use the Bourgault Customer Centre to access the extensive library of instructions, updates and recommended settings for current and past Bourgault systems. Accessible through the Bourgault web page at [www.bourgault.com](http://www.bourgault.com), suggest bookmarking the link in their smart phone and using it when trouble shooting in the field, or checking for updates on their units.

