



MANAGE LEASE RETURNS | PURCHASE QUALITY PRE-OWNED

# Kubota Dealer Job Aid

## Administrative Functions

SHOWROOM USER ADMIN

GROUNDING OFFER NOTIFICATIONS

## User Functions

ACCEPT LEASE RETURNS

PURCHASE LEASE RETURNS

VIEW PAST LEASE RETURNS

NAVIGATE PRIVATE AUCTION

PURCHASE AT PRIVATE AUCTION

AUCTION PURCHASE OFFERS

## Grounding Leased Equipment

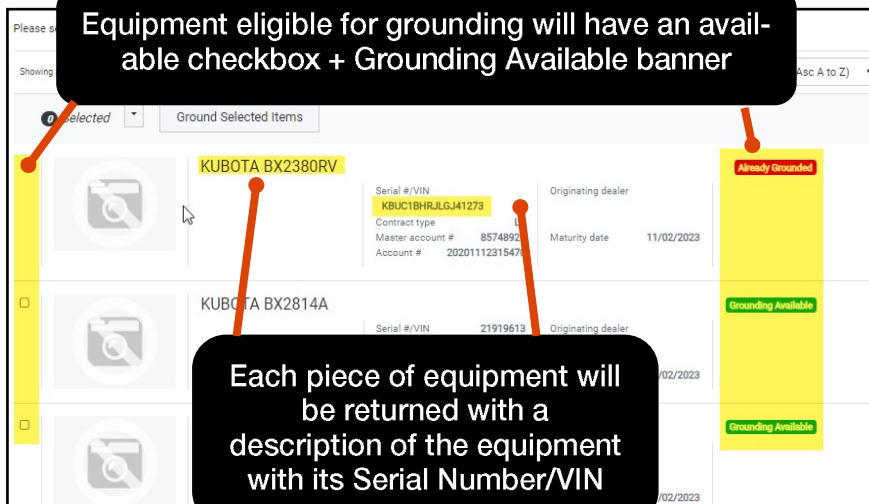
▶▶ 1. **SELECT** Ground from the Dealer Direct toolbar.



▶▶ 2. From the Search form, use the criteria drop-down to **DEFAULT** the search to the customer's KCC account number or **CHANGE** the search to use the Serial Number/VIN for the equipment.



Equipment eligible for grounding will have an available checkbox + Grounding Available banner

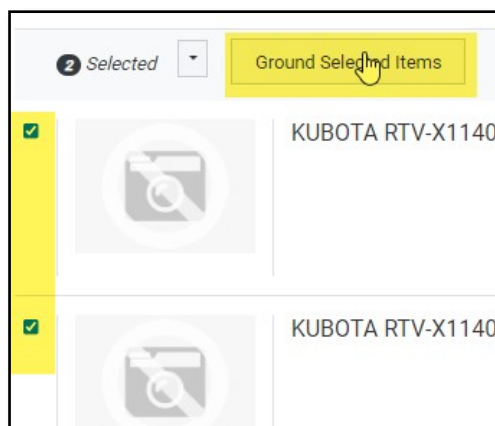


Each piece of equipment will be returned with a description of the equipment with its Serial Number/VIN

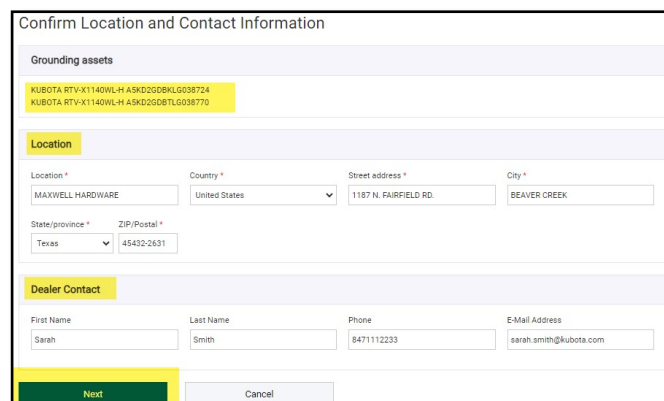
▶▶ 3. **ENTER** the corresponding Search data then **SELECT** the magnifying glass to search for the equipment.

If the search criteria is a match for a KCC lease account the results will return all of the equipment associated to the customer's account number (or equipment on the same account as searched Serial Number/VIN).

▶▶ 4. **CHECK** the checkbox next to each piece of eligible equipment that has been returned then **SELECT** Ground Selected Items.



▶▶ 5. **REVIEW** all information displayed in the subsequent Location and Contact Information confirmation page (defaults to logged in dealer user profile). **MODIFY** if needed then select **NEXT**.





## Grounding Leased Equipment

- ▶▶ 6. **INPUT** equipment condition details including any noticeable damage or missing items + usage hours for EACH piece of equipment. **Hours are required.** \*Note that this information will be saved/printed on both the customer and dealer receipt documents.

**SELECT** Next to proceed.

**Confirm Condition and Usage Detail**

KUBOTA RTV-X1140WL-H - SN: A5KD2GDBKLG038724

Noticeable damage or missing items? Hours (h)\*

damage to left front wheel 256

(974 characters remaining)

---

KUBOTA RTV-X1140WL-H - SN: A5KD2GDBTLG038770

Noticeable damage or missing items? Hours (h)\*

35

(1000 characters remaining)

**Next** Go back

- ▶▶ 7. Carefully **REVIEW** all grounding details to confirm their accuracy. If changes are needed, **SELECT** Go Back. Upon confirmation that all equipment is accurate, **SELECT** Confirm to submit the information to KCC.

**Confirm Grounding**

You are grounding the equipment listed below. By completing this step, you are acknowledging that the listed equipment has been returned by the lessee and is currently stored at the location below. Grounding the equipment will terminate the lease effective today. Are you sure you want to ground these items with the following information?

**Grounded Equipment Detail**

Description	Serial #	Master account #	Hours (h)	Condition
KUBOTA RTV-X1140WL-H	A5KD2GDBKLG038724	85936359	256	damage to left front wheel
KUBOTA RTV-X1140WL-H	A5KD2GDBTLG038770	85936359	35	

**Location and Contacts**

**MAXWELL HARDWARE**  
1187 N. FAIRFIELD RD., BEAVER CREEK, Texas, 45432-2631, US

**Contract Date**  
12/29/2020

**Lease Maturity Date**  
01/03/2024

**Dealer Contact**  
Sarah Smith  
8471112233  
sarah.smith@kubota.com

**Confirm** Go back

- ▶▶ 8. **SELECT** the Download Customer Receipt option to access a customer receipt that can be printed or emailed. **SELECT** the Download Dealer Receipt to access your dealership's receipt. **SELECT** Home to return to the Dealer Direct Home page.

**Note: Dealer vs. Customer receipts contain different data points and branding, please ensure the appropriate version is provided to your customer.**

**Successful!**

You have successfully grounded the below items. As the grounding dealer, you will have the exclusive opportunity to purchase this equipment before it is listed in the Private Sale. You will be notified when the equipment has been priced and is available on the Pass/Purchase tab.

**Grounding assets**

KUBOTA RTV-X1140WL-H A5KD2GDBKLG038724  
KUBOTA RTV-X1140WL-H A5KD2GDBTLG038770

**Download Customer Receipt** **Download Dealer Receipt** **Home**



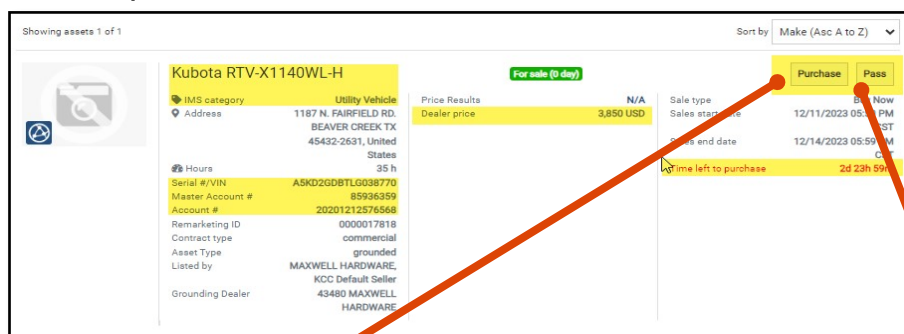
### Purchase or Pass

- 1. Once equipment is priced by KCC, the grounding dealer will have an exclusive purchase window of 72 business hours. Upon completion of pricing you will receive an email notification of your purchase offer AND the equipment will be visible within the Pass/Purchase page of Dealer Direct.



**SELECT** Pass/Purchase to view and decision your purchase offers.

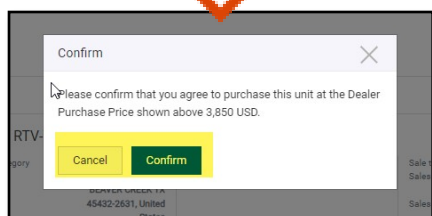
- 2. Each purchase offer will be displayed in the Pass/Purchase screen with the relevant equipment, condition and pricing information. The time left to purchase will be displayed. If a Pass or Purchase decision is not entered within 72 business hours the status will default to Pass and auction processes will be initiated. **SELECT** either the Purchase or Pass option as desired.



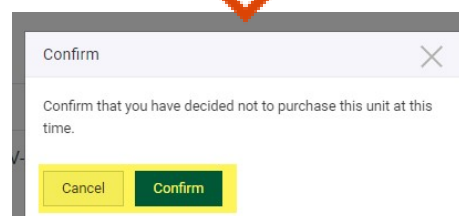
Upon selecting **PURCHASE**, a confirmation window will appear providing the purchase price and allowing you to Cancel or Confirm your purchase.

OR

Upon selecting **PASS**, a confirmation window will appear allowing you to Cancel or Confirm that you DO NOT wish to purchase the equipment



Upon confirming **PURCHASE**, KCC will be notified of your purchase and pending payment.



Upon confirming **PASS**, KCC will be notified to initiate inspection & auction processes.





- 3. Upon selecting PURCHASE the Dealer Direct user will receive a Purchase confirmation email that provides the details of the purchase including equipment, price & payment information. Payment for purchased lease equipment is due to Kubota Credit Corporation within 3 business days of purchase and can be made by Check or Wire using the addresses below.



This email serves as a purchase confirmation for the returned lease equipment below.

Purchase date: 2023-12-20

Dealer price: \$4,000 USD

Account number: AN1220230952

Master Account Number:

Contract type: commercial

IP Listing ID:

Is this asset a repossessed asset?: grounded

Grounded date:

Year/Make/Model: 2020/Volvo/A 20

Serial/VIN: SN1220230952

Hours/Miles/KM:

Purchaser:

Nick Heinz

8000 Nick Heinz Kubota Dr

Grapevine, Texas, 76051

234204723

nick.heinz@kubota.com

Additional questions regarding the equipment, price or payment should be directed to the

Kubota Credit Remarketing Team  
at 800-794-4992, option 7

or

via email at  
kcc\_g.kccauction@kubota.com

**Kubota Credit Corporation**  
**WIRE** payment:

Citi Bank  
ABA: 031100209  
Account: 38793616  
One Penn Way  
New Castle, DE 19720

**Kubota Credit Corporation**  
**CHECK** payment:

Kubota Credit Corporation  
P.O. Box 2313  
Carol Stream, IL  
60132-2313



- 1. Previously grounded equipment can be viewed and receipts reprinted on demand through your Dealer Direct Documents menu option.



**HOVER** over your username in the top right hand corner of the Dealer Direct site.

- 2. **SELECT** Documents to access the Search Documents screen.



- 3. **ENTER** grounding details to search for prior lease returns, including a date range (required) and Master Account Number and/or Serial Number to limit your results.

Documents

Choose your date range to view/download historical documents.

**Search Documents**

Start date *	End date *	Master Account Number	Serial Number
12/01/2023	12/12/2023		
<input type="button" value="Search"/>			

- 4. A list of lease returns matching the specified search criteria will be returned, **SELECT** the desired receipt to initiate a download of it.

**Note: Dealer vs. Customer receipts contain different data points and branding, please ensure the appropriate version is provided to your customer.**

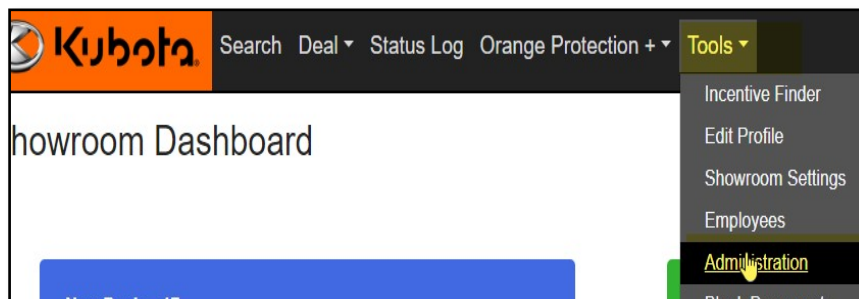
1 2 3 4 >> Showing items 1 - 20 of 63

Date	Customer Name	Master Account Number	Dealer Contact	Download Receipt
11 Dec 2023	I	85750156	Tucker - Purchase Claim, Jennifer	Customer Dealer
11 Dec 2023	MO	85936359	Dealer, Sarah	Customer Dealer
11 Dec 2023	EASTE	85231496	Tucker - Purchase Claim, Jennifer	Customer Dealer

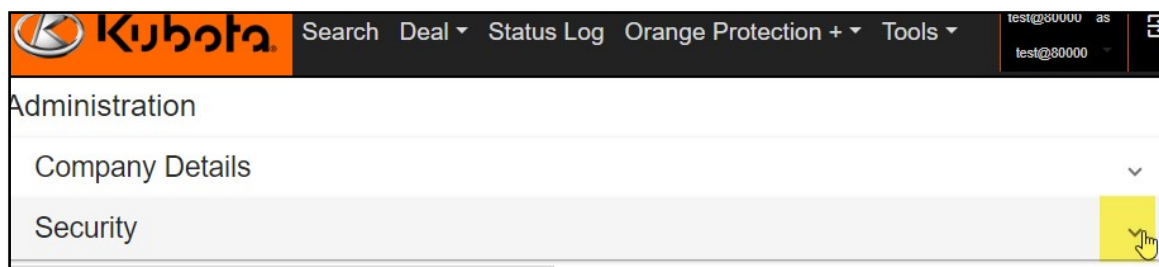


- 1. Dealer Direct access and roles (including Private Auction) are controlled directly through the Showroom 'Administration' maintenance application by your Dealer admin user.

After logging into Showroom as an administrator, **SELECT** the tools option from the Showroom toolbar then **SELECT** the Administration option from the drop down menu to access the Dealer Employees maintenance application.

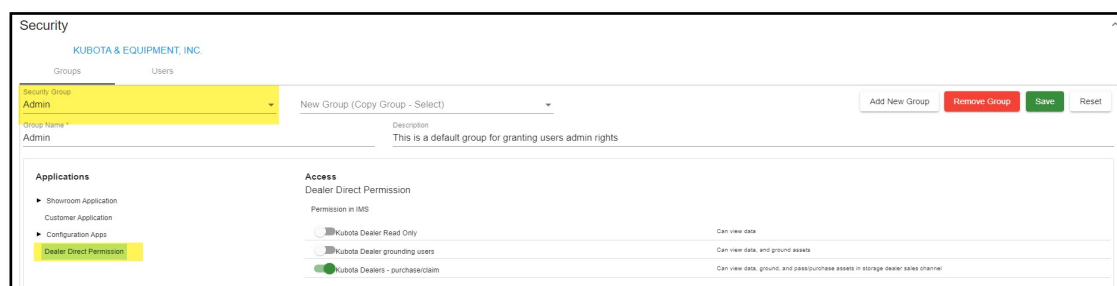


- 2. Upon selecting Administration you will be taken to your company details & security page. **SELECT** the down arrow to the far right hand of the screen to open the Security administrative options.



- 3. Within the Security options, **SELECT** the Dealer Direct Permission option on the bottom left hand side of the Applications list. By selecting your existing configured Security Group in the Security Group dropdown and having the Dealer Direct application selected you will be able to manage the Dealer Direct permissions for the entire group. *(If you wish to manage the permissions for a single user, skip to step 5 of this section.)*

For example in the screen below all users in the Admin group have Dealer Direct Purchase/Claim permissions (Can view data, ground, and pass/purchase assets in the storage dealer sales channel. Also enables full access to Private Auction for viewing auctions and making purchases.





- 4. To update Dealer Direct access for a **Showroom Security Group**, you can use the toggle buttons to the left of each Dealer Direct permission to modify the access level that the group will have within Dealer Direct.

For example, in the setup above, the All Users Security Group has no Dealer Direct permissions. To allow all Showroom Users for the dealership to have View/Read Only access to Dealer Direct, **SELECT** the toggle button to the left of the Kubota Dealer Read Only to 'turn on' those Dealer Direct permissions. After selecting the desired permissions for the Security Group, **SELECT** Save to save the change to the group. After selecting Save a message will display at the bottom of the screen confirming that the permission changes have been saved. All Dealership users within the All User Security Group will now have access to view all dealership data within Dealer Direct upon their next login event.

- 5. To update Dealer Direct access for a single Showroom user ONLY, **SELECT** the Users tab within the Security application window which will provide a list of all configured Showroom



- 6. Within the User Details options, **SELECT** the Dealer Direct Permission option on the bottom left hand side of the Applications list. After selecting the desired user from the Select User dropdown and selecting Dealer Direct Permissions from the Applications list you can then modify the desired permissions for **ONLY** that user.

**Note: User level permissions (vs. group) are not a preferred change within Showroom so you must select the lock icon next to the permission you wish to change for the user before then using the toggle button to enable or disable.**

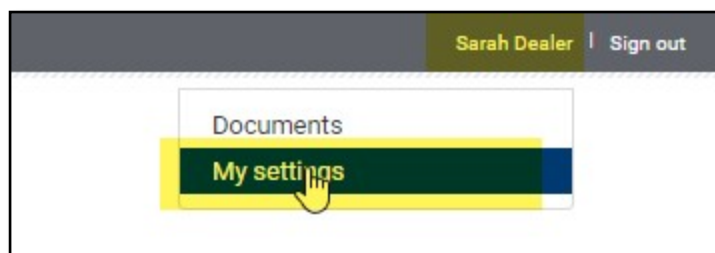
For example, in the setup above, the 'aivanovitz@80000 user' has Kubota Dealers-purchase/claim permissions.

To update **only this user** to Read Only access to Dealer Direct, **SELECT** the lock button next to the Kubota Dealers—purchase/claim permission **AND** to the Kubota Dealer Read Only permission. After selecting these the toggle buttons for the permissions will allow you to update each permission as desired. **SELECT** the toggle button for the Kubota Dealer Read Only permission to enable it and also the toggle button for Kubota Dealers—purchase/claim to disable it. **SELECT** Save.

Upon selecting Save a message will display at the bottom of the screen confirming that the permission changes have been saved. The user's profile is now updated with the appropriate access upon their next login event.



- ▶▶ 1. Dealer Direct email notifications receive and use the Showroom dealer user contact information configured in Showroom. Within Dealer Direct, users can view this information and opt in for grounded asset notifications using the Dealer Direct My Settings menu option.



**HOVER** over your username in the top right hand corner of the Dealer Direct site.

- ▶▶ 2. **SELECT** My Settings to access your configured User Settings.

- ▶▶ 3. If you wish to receive notifications when returned lease equipment is available for sale, **SELECT** the checkbox next to 'Yes' under the 'Send me Grounded Asset pass/purchase notification'.

**SCROLL DOWN** to the Save option at the bottom of the page and **SELECT** Save. The email address shown in your Dealer Direct user settings (received from Showroom) will now receive an email notification each time your dealership accepts returned lease equipment from a customer and the exclusive purchase offer is extended to your dealership.

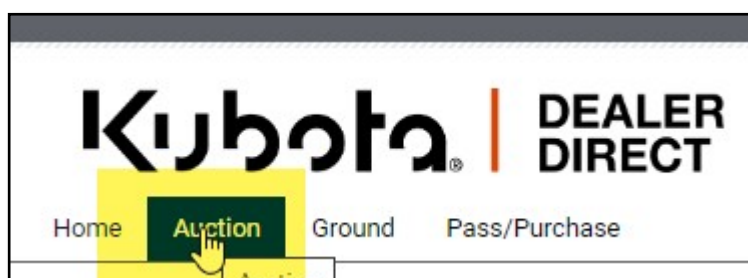
**Note:** Purchase offers must be accepted in Dealer Direct within 72 hours of notification or a Pass decision will automatically be registered that initiates auction inspection processes.

**All email notifications will be sent to the e-mail address administered in Showroom. If you need to update your e-mail address, contact your Dealer Showroom Admin to update your profile.**





- 1. Dealer Direct provides your dealership with access to online Kubota DEALER ONLY auctions for pre-owned equipment (returned lease equipment from other dealerships, repossessions, KTAC salvage or KTC Engineering units). To access online auctions, **SELECT** Auction from the Dealer Direct menu.



- 2. Upon selecting Auction you will be redirected to KCC's Auction Site where you can browse current and prior auctions.\* **SELECT** the For Sale tab to browse all upcoming and active auctions or **SELECT** the Sold tab to view past auctions. Use the left hand filter options to limit the results on both tabs to specific equipment types, makes, models, years or pricing categories. **Note: Users must have the Dealer Direct permission for Purchase/Claim enabled for Auction access. See Showroom User Permissions for more information.** \*History available from Dealer Direct launch, 3/18/24. If transactions prior to 3/18/24 are needed, please contact [kcc\\_g.kccauction@kubota.com](mailto:kcc_g.kccauction@kubota.com)

## SAVING SEARCHES

To save your search criteria for quick use in the future, **SELECT** Save this search.

The Save Search window will open. **ENTER** a name for your search. If your preference is NOT to receive new equipment alerts for it, uncheck the notifications box. Select **SAVE**. The search will now be available from your My Account page (accessed by selecting your user ID from top right of screen).

The screenshot shows the '2 items for sale' page. On the left, there are filters for Type (Agricultural Tractors, Excavators), Buying Format (Auction, Online Auction), Make (Kubota), Model (G 1900, Series U), and Year (2010-2014). The main area shows two items for sale: '2012 Kubota Series U...' and '2007 Kubota G 1900...'. A 'Save this search' button is highlighted with a red box and a callout arrow. The callout box shows a dialog titled 'Name your saved search' with a text input field, a checkbox for 'Email me when new items match this search', and a 'Save' button.



## NAVIGATE PRIVATE AUCTION

### COMPARING EQUIPMENT

To compare equipment, **SELECT** the Compare checkbox under each item you wish to compare.

**SELECT** the Compare items button from the top right hand side of the screen.

Item Information	2102001	2102002
Brand	2007 Kubota G 1900 Utility Tractor	2012 Kubota Series U Mini Excavator
Description		
Features		
Notes		
Serial #		W4C2C24
Meter Reading	0 Miles	0 Miles
Highest Bid		
Starting Price	US \$6,000	US \$5,500
Location	Texas	Texas
Inspection Completed	N/A	February 28, 2024
Overall Comment	N/A	N/A
General Appearance		
Hour Meter / Odometer	0 mi - No guarantee made as to actual hours/miles (kilometers, the inspection report reflects what can be visually observed).	
Serial Number / VIN		W4C2C24
Warranty Status		
Hour Meter		0 mi - No guarantee made as to actual hours/miles (kilometers, the inspection report reflects what can be visually observed).

A side-by-side comparison of the selected equipment will be presented.

### WATCH LIST

To add an item to your personal Watch List, **SELECT** Add to Watch List.

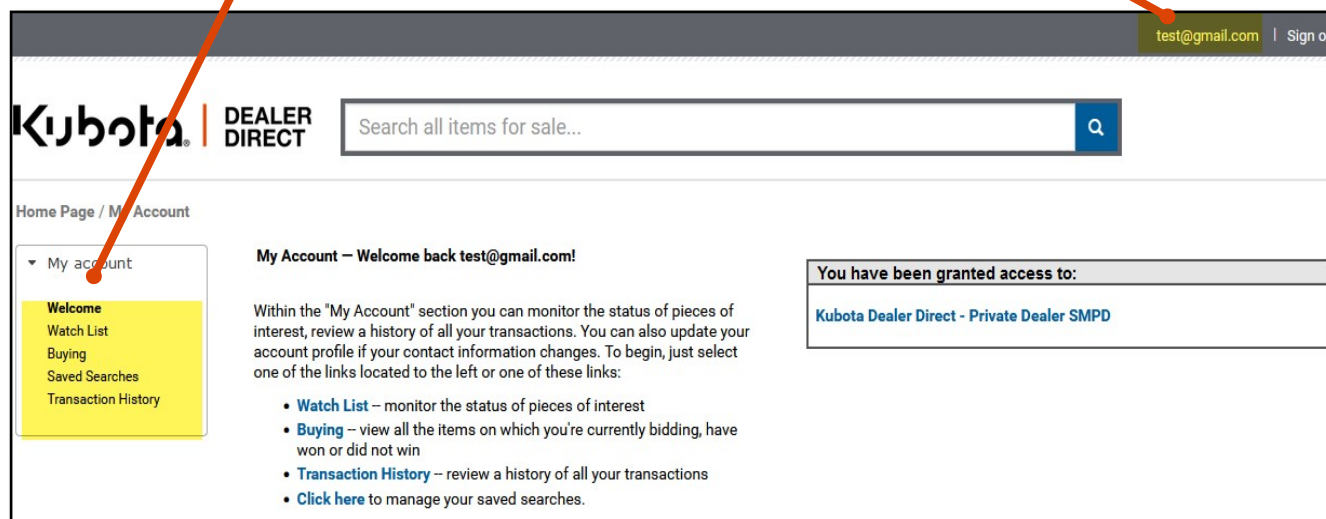
Upon selecting Add to Watch List a Watching flag will be displayed on the item.

**NOTE:** If a pending auction item is added to your watch list you will be notified via e-mail when the auction opens.



The Private Auction My Account page provides easy access to your Watch List, Bidding Activity, Purchase History & Saved Searches. It can be accessed by **SELECTING** your e-mail address/user id from the top right hand corner of the screen.

**MY**  
**ACCOUNT**



## My Account Options

### » Watch List

- View your watch list and remove items as desired

### » Buying

- View all auctions where you are the high bidder

### » Saved Searches

- View your Saved Searches and update your e-mail notification preferences

### » Transaction History

- View purchases from the last 90 days OR all prior auction purchases\*

*\*History available from Dealer Direct launch, 3/18/24. If transactions prior to 3/18/24 are needed, please contact [kcc\\_g.kccauction@kubota.com](mailto:kcc_g.kccauction@kubota.com)*



- 1. Once you have identified an item in an active auction that you have interest in purchasing, **SELECT** the item's hyperlink to view additional details for it and place your bid.

### 2012 Kubota Series U Mini Excavator

ITEM NUMBER 21034204  
LOCATION Celina, Texas, United States.  
BIDDING ENDS 53 sec\* (extended)  
HIGHEST BID US \$5,700  
BID INCREMENT US \$500

1 bid  
Reserve not met ⓘ

US \$  **PLACE BID**

You will confirm this bid on the next page. How Bidding Works ⓘ  
[+ Add to Watch List](#)

Private Marketplace

**Quick View**

**2012 Kubota Series U...**

Meter: 0 mi  
Texas  
(6,606 mi away)

Online Auction  
**US \$5,700**  
21 hours, 59 mins

**Add to Watch List**

☐ Compare

- 2. The bid screen will provide information on the bid history and reserve amount and allow you to place your bid. Enter your bid amount and **SELECT** Place Bid.

- 3. A bid confirmation page will be displayed that confirms your bid amount and your commitment to purchase should it be the winning bid. Check the box next to the sale agreement affirmation and **SELECT** Confirm Bid to register your bid and intent to purchase.

**NOTE: If your bid does not satisfy the reserve amount, you will receive a notification upon bid placement to increase your bid to meet the reserve**

Its / 2012 Kubota Series U Mini Excavator / 2012 Kubota Series U Mini Excavator / Confirm Your Bid

**Confirm your bid on Item 21034204 - 2012 Kubota Series U Mini Excavator**  
Located in Texas, United States

You are Signed In as **test@gmail.com** (email: **test@gmail.com**) from Internet address **10.15.15.20**, registered in **FT. WORTH, USA**. (Registration incomplete or wrong? [Update your profile](#))

**Your Maximum Bid Amount: US \$5,800**

In response to other bids, the IronPlanet auction system will automatically bid on your behalf, **once your bid is confirmed below**, in the smallest increment possible to keep you in the lead, up to your maximum amount. Your maximum bid amount is never revealed to other bidders.

Your bid is **not yet** placed.  
By clicking **CONFIRM BID**, you commit to buy this item if you are the winner.

☒ I agree to buy this item if I am the winner. **Confirm Bid**

Bids are legally binding and cannot be retracted. You are obligated to complete the purchase of this item if you are the highest bidder at the end of the auction.

[Cancel](#)



►► 4. After bidding, you will receive e-mail notifications regarding the auction's activity including

- **Outbid**—Your maximum bid has been outbid by another buyer. If the auction is still active you must increase your bid to continue your purchase attempt.
- **Confirmation of Sale**—The auction has ended and you were the winning bidder, payment should be initiated following the provided instructions.
- **Second Chance Offer**—The auction has ended and you were not the highest bidder OR the reserve was not met but the seller has extended an offer to you. **The offer must be reviewed and accepted/actioned to proceed with purchase.**
- **Sold**—An item you bid on has been sold to another bidder for a higher amount.
- **Sold, Similar Items Available**—An item you bid on has been sold to another bidder for a higher amount but similar items are available for review and bidding.
- **No Longer Available**—An item you bid on has been removed from For Sale status by an auction administrator and is no longer available.



## Auction Reminders

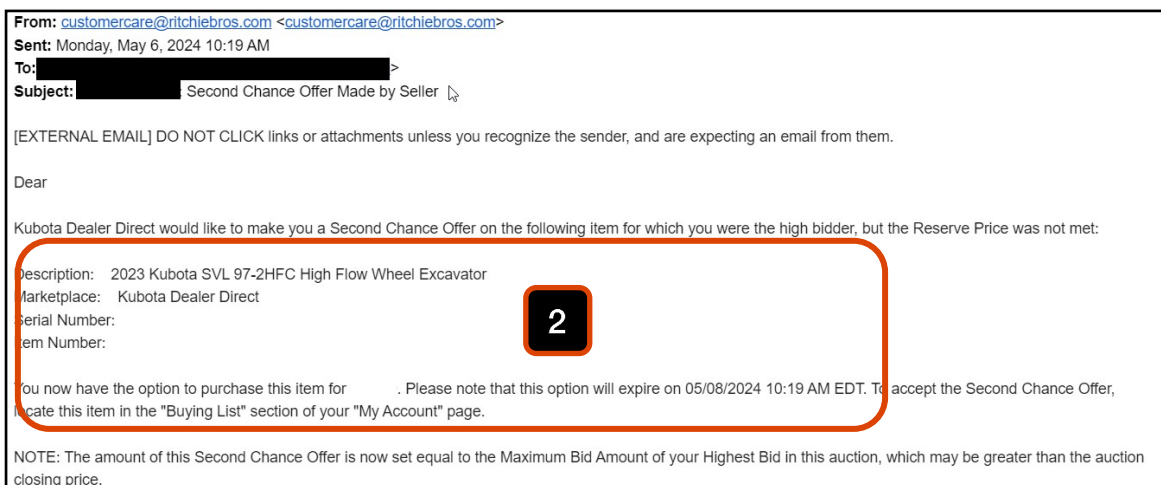
- \* All email notifications will be sent to the e-mail address administered in Showroom. If you need to update your e-mail address, contact your Dealer Showroom Admin to update your profile.
- \* Only Showroom users with the Dealer Direct permission for Purchase/Claim have access to log into Private Auction. If you need to update your access, contact your Dealer Showroom Admin to include you in a Security Group with Purchase/Claim access or have the role added to your individual user profile.
- \* It is your responsibility to review all available equipment information BEFORE placing a bid, **bids are purchase commitments.**
- \* Payment for winning bids must be sent to Kubota Credit within 3 business days of auction close using the provided payment instructions on the confirmation of sale email.



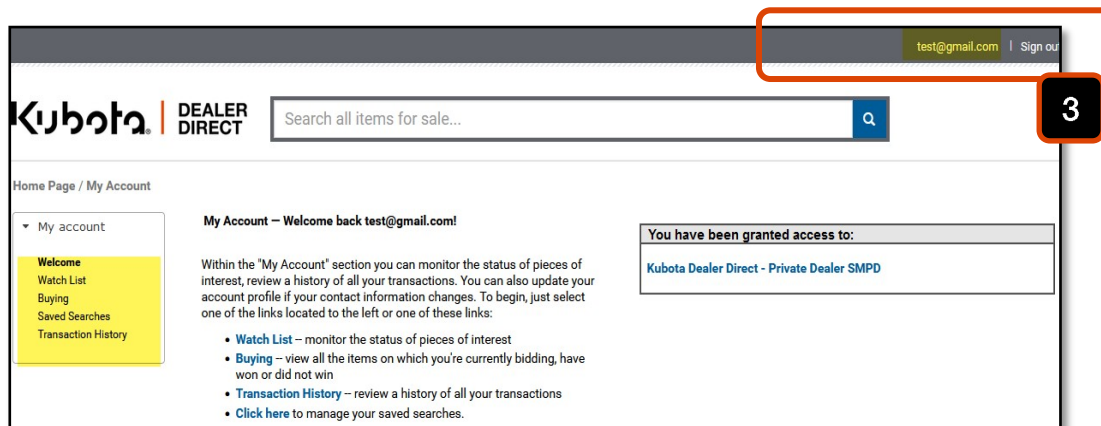


When an auction item does not sell because it did not meet the reserve price, KCC or KTAC may choose to extend a pre-arranged price or 'second chance offer' directly to the highest bidding dealer.

- ▶▶ 1. When the offer is initiated by KCC or KTAC the selected dealer (highest bidder) will receive an email from Dealer Direct advising them of the offer, example below.



- ▶▶ 2. The email will provide the equipment information as well as the offer price and the expiration date of the offer. If you do not wish to accept the offer and make the purchase, **NO ACTION IS NECESSARY**. If you wish to proceed with the purchase at the offer price, you will need to access your account within Dealer Direct to accept it and confirm your purchase.
- ▶▶ 3. To access and accept the offer, **LOG INTO Showroom** then **NAVIGATE** to Dealer Direct. Once in Dealer Direct, **SELECT** your User Name in the top right hand corner of the screen to be taken to your My Account page.







►► 4. From the My Account page, **SELECT** the **Buying** option to view your offers.

Home Page / My Account / Buying

My account

- Welcome
- Watch List
- Buying**
- Saved Searches
- Transaction History

Note that bidding is still open and you may be outbid. [Refresh!](#)

Item #	Year   Make   Model   Type	Location	Currently	Your Max	Bid Status	Closes
21050789	2016 Hooper 6.5 X 20 BT Utility Trailer	TX	US \$4,750	US \$4,850	Highest bid was yours, Reserve not met	Pacific Daylight Time

Second Chance Offer - Buy for US \$4,850 5/7/24 9:43 AM

4

►► 5. **SELECT** the Item # to view the Offer details. If you wish to proceed with purchasing after reviewing the details, **SELECT** the **Confirm Purchase** option.

Home Page / My Account / Buying / Accept Second Chance Offer

Second Chance Offer for Item 21050789, a 2016 Hooper 6.5 X 20 BT Utility Trailer

Second Chance Offer Amount: US \$4,850

Second Chance Offer Expires: 05/09/2024 09:45 AM PDT

NOTE: The amount of this Second Chance Offer is now set equal to the Maximum Bid Amount of your Highest Bid in this auction, which may be greater than the auction closing price.

What would you like to do next?

**Confirm Purchase for \$4,850** [Return to Previous Page](#)

5

►► 6. Upon selecting the confirmation you will be redirected to the **Purchase Complete** page that confirms your purchase. A confirmation of sale email will follow that provides detailed payment and pickup instructions.

Home Page / My Account / Buying / Purchase Complete

**Purchase Complete**

**Purchase Status:** Purchase successful. This sale is now Closed

**Purchase Amount:** You have purchased this item for US \$4,850. You will soon be receiving a Confirmation of Sale detailing your payment instructions.

**Help:** If you have a question, please call Customer Care.

[My Account - Transaction List](#) [Item Details](#)

►► 7. Your purchase is now included in your Purchase history which can be viewed by **SELECTING** **Transaction History** from the **My Account** menu.

Kubota

Home Page / My Account /

My account

- Welcome
- Watch List
- Buying
- Saved Searches
- Transaction History**

7



**Your SOURCE**  
for quality pre-owned  
**KUBOTA inventory**  
*direct from*  
*Kubota Credit Corporation, U.S.A.*

**Additional questions or assistance needed?**  
Contact Kubota Credit



[kcc\\_g.kccauction@kubota.com](mailto:kcc_g.kccauction@kubota.com)



833-637-7755

