



StrataVAR PQW (Partner Quoting Workspace) User Guide



About This User Guide

This user guide describes how to use the StrataVAR Partner Quoting Workspace (PQW). This user guide contains the following chapters –

- **Chapter 1, Introducing StrataVAR PQW**, page 7, introduces StrataVAR PQW, describes its basic concepts and the workflow for using it.
- **Chapter 2, Quick Tour of the Interface**, page 19, describes how to launch StrataVAR PQW and to get started with Accounts, Contacts, Opportunities and/or Projects. This chapter also provides a quick tour of some special StrataVAR PQW user interface features.
- **Chapter 3, Importing Sources – Creating BoMs**, page 31, describes how to import quotes from supplier sources into StrataVAR PQW, which are then called BoMs.
- **Chapter 4, Assembling a Quote**, page 57, describes how to collect and group the items of the imported BoMs to be included in an exported StrataVAR PQW Quote.
- **Chapter 5, Pricing a Quote**, page 79, describes how to price the items in a StrataVAR PQW Quote and to define its costs, discounts, margins, end-customer prices and so on.
- **Chapter 6, Exporting a Quote**, page 93, describes how to export a customized customer-facing quote in Excel.

General Notes

- This user guide is intended for both existing Salesforce users (using the StrataVAR PQW Extension in the classic Salesforce.com) and non-Salesforce users of StrataVAR PQW (using the OEM Salesforce Force.com version that is provided prepackaged with StrataVAR PQW). Almost all functionality is identical for both types of users, except for the slight differences of the Salesforce tab in which the StrataVAR PQW functionality appears (**Opportunities** tab versus **Projects** tab, as described on page 10). Also some features, such as the **Settings** and **Configure** tab, may appear in a different place in each version.
- In addition to the above, each Salesforce version may have various customizations, which may cause the user interface to appear slightly different than shown in this user guide.

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Glossary

Acronym	Description
API	Application Program Interface
BoM	Bill of Materials
CCW	Cisco Commerce Workspace
CCW-R	Cisco Commerce Workspace – Renewals
DVAR	Direct VAR or 1-tier VAR
ICT	Information and Communications Technology
OEM	Original Equipment Manufacturer
PaaS	Platform as a Service
PQW	Partner Quoting Workspace
Tier 1 VAR	VARs that purchase directly from Cisco or from a Distributor
Tier 2 VAR	VARs that only purchase from Distributors
VAR	Value Added Reseller
VIP	Value Incentive Program



Introducing StrataVAR PQW

This chapter introduces StrataVAR PQW, describes its basic concepts and terms and the workflow for using it.

1.1 Introduction

The buying side of acquiring Cisco hardware and software is controlled by Cisco Commerce Workspace (CCW). This is typically performed by vendors, who do not sell solutions directly to customers. This is where Value Added Resellers (VARs) come in and handle the direct sales of equipment and solutions to customers.

The StrataVAR Partner Quoting Workspace (PQW) quoting solution addresses the workflow challenges of both Information and Communications Technology (ICT) Value Added Resellers (VARs), meaning Cisco partners who use Cisco Commerce Workspace (CCW) to fulfill orders, either directly or through distributors.

The StrataVAR PQW SaaS application streamlines the process of creating quick and accurate customer-facing quotes that are customized to each specific customer and your internal process requirements.

StrataVAR PQW puts items, pricing and discount data for building a quote at your fingertips, in addition to a wide variety of automatic pricing, discounting and quoting tools.

StrataVAR PQW uses Salesforce™ Force.com™ Platform as a Service (PaaS) to securely host reseller BoMs and data.

StrataVAR PQW is designed for both Tier 1 VARs (who purchase directly from Cisco) and Tier 2 VARs (who purchase from a Cisco Distributor – also called a *Disti*).

This product provides an abundance of functionality for Cisco products, as well as for other vendors (such as HP, IBM, Dell and so on via Distributors) and for major Distributors, such as IngramMicro, TechData, Westcon, Arrow and more.

1.2 Basic Concepts and Terms

StrataVAR PQW is used by VARs to streamline the process of creating end customer-facing quotes. Various concepts and terms may have slightly different (or similar) names when used by different players in the quoting process. In order to uniquely identify the concepts discussed in this user guide, the following describes a few of these terms.

1.2.1 The Source (Suppliers)

The first link in the supply chain for our purposes is the suppliers who are the source of the Quotes or BoMs. These may be vendors, such as Cisco, Distributors and other Vendors, such as IBM, HP, Dell and so on. These are the entities from which Value Added Resellers (VARs) purchase products.



Figure 1 – StrataVAR PQW Quoting Players

1.2.2 VAR

A Value Added Reseller (VAR) purchases equipment from a **Supplier** according to the **Costs** specified in a **Supplier Quote**, or based on BoMs with a list price and discount on the list price.

1.2.3 Quotes

The various players involved in the quoting arena use the word *Quote* to mean different things.

Supplier Quote (Source Quote)

This is the Quote that is imported from outside sources (suppliers) into StrataVAR PQW into a BoM object – such as a Disti Quote and a CCW-R Quote.

A **Supplier Quote** is provided by a **Supplier** to a **VAR** in order to define the list and **Cost** of items. After being imported into StrataVAR PQW, a **Supplier Quote** is referred to as a **BoM**, as described on page 9.

StrataVAR PQW Quote

This is the Quote that you create and that lives inside StrataVAR PQW while you assemble items into it from the imported BoMs (described below) and price those items.

A **StrataVAR PQW Quote** places the full power of StrataVAR PQW's quoting functionality at your fingertips and provides a variety of options for handling cost, pricing, discounts, margins and more.

Exported Quote

StrataVAR PQW enables you to export the StrataVAR PQW Quote as Excel in order to be provided to end-customers or for any other purpose. This Quote can also be converted to PDF (automatic conversion to PDF is coming soon).

During the export process, StrataVAR PQW automatically adds a variety of features. PQW provides a variety of customer quoting templates, and enables you to automatically apply your logo, contractual business and payment terms, special discounts and much more for each customer.

Quotes – A Summary

A *Disti Quote* and a *CCW-R Quote* can be imported into StrataVAR where they become BoMs. You can then use the BOMs to assemble a *StrataVAR PQW Quote* and then price the items in the *StrataVAR Quote*. After you have finished, you can *export this Quote* to be given to an end-customer or to be used for any other purpose.

1.2.4 Cost

A **Supplier Quote** and a **BoM** specify the **Cost** of each item in it. This is the **Cost** that the **VAR** pays the **Supplier**.

1.2.5 BoM

Supplier Quotes (described on page 8) are imported into StrataVAR PQW by **VARs** and converted into a normalized entity called a Bill of Materials (**BoM**).

A StrataVAR PQW **BoM** represents a smart hierarchical list of items and sub-items. A BoM specifies the **Cost** of each item, in addition to a variety of other types of information about each item and its connections to other objects in Salesforce. A BoM maintains CCW hierarchy and box-level validation.

Each BoM is imported under a specific **Opportunity** or **Project**. In addition, you can mark some BoMs as reusable, so that they can be used in a different **Opportunity** or **Project**. These BoMs can be assembled into a Quote in any Opportunity or Project.

1.2.6 Assembly

Assembly is the process of selecting the BoMs and the specific BOM items to copy into a Quote.

1.2.7 Price (End-customer)

The **Price** of each item appears in the **StrataVAR PQW Quote** and in the exported **Customer-facing Quote**. This is the amount that the end customer pays the VAR.

1.2.8 Salesforce Concepts and Terms

StrataVAR solutions are built upon a well-known cloud-based platform called Force.com, the world leader in PaaS provided by Salesforce™ (also called Salesforce.com or SFDC) that securely hosts and presents all reseller data, such as Account information, BoMs, Quotes and additional data.

Current Salesforce Users – StrataVAR PQW Salesforce Extension

If you are already using Salesforce.com, then you can use StrataVAR PQW as a **Salesforce Extension** that integrates transparently with Salesforce functionality.

Non-Salesforce Users – Embedded Salesforce OEM Version (Force.com)

If you are not currently using Salesforce, then StrataVAR PQW is automatically provided with a light embedded OEM Salesforce version called *Force.com*.

Force.com is Salesforce.com's PaaS that enables the creation of new applications using the world's most secure, scalable and flexible platform. Force.com makes the core technologies behind Salesforce CRM available for developing applications.

StrataVAR PQW supports both Classic and Lightning Salesforce (Force.com) UI modes.

In StrataVAR PQW, almost everything is identical for users of both the **Salesforce Extension** and the **Embedded Salesforce** version, except that StrataVAR PQW operates in the **Opportunities** tab in the Salesforce Extension and in the **Projects** tab in the embedded Salesforce version, as described below.

Salesforce Opportunities – Current Salesforce Users

A Salesforce **Opportunity** generally represents a sales Opportunity or pending deal for which a VAR is preparing a Quote for a customer using StrataVAR PQW.

For current Salesforce users, the StrataVAR PQW playing field takes place in the **Opportunities** tab of the Salesforce StrataVAR PQW Extension.

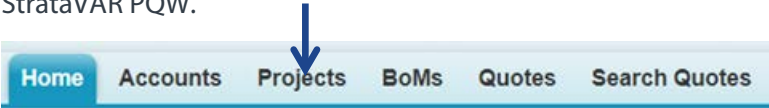


Each Salesforce **Opportunities** tab shows the related lists of its BoMs and Quotes. For example, as shown below –

A screenshot of the Salesforce 'Opportunities' page. It displays two main sections: 'BoMs' and 'Quotes'. The 'BoMs' section has a table with columns: Action, BoM Number, Record Type, BoM Name, Total Extended List Price, Total Discount, Discount Status, Total Extended Net Price, VIP Payroll, Deal Status, and Last Modified Date. The 'Quotes' section has a table with columns: Action, Quote Number, Quote Version, Quote Name, Total Extended List Price, VAR Total Cost, VAR Discount, VAR Total Profit, Total Customer Extended Price, Customer Discount, and Active. Below these are sections for 'Open Activities', 'Activity History', 'Notes & Attachments', and 'Contact Roles', each with a 'No records to display' message and a 'New' button.

Salesforce Project – Non-Salesforce Users

For non-Salesforce users, the StrataVAR PQW playing field takes place in the **Projects** tab of the Embedded Salesforce version that is automatically provided with StrataVAR PQW.



Each Salesforce **Projects** tab shows the related lists of its BoMs and customer-facing Quotes. For example, as shown below –

Custom Links

[Google Search](#) [Google Maps](#) [Google News](#)

[Hoovers Profile](#)

[Edit](#) [Delete](#) [View All Special Instructions Summary](#)

Contacts [New Contact](#) [Merge Contacts](#) [Contacts Help](#)

Action	Contact Name	Title	Email	Phone
Edit | Del	Howard Jones	Buyer	info@salesforce.com	(212) 555-5555
Edit | Del	Edward Stamos	President and CEO	info@salesforce.com	(212) 555-5555
Edit | Del	Leanne Tomlin	VP Customer Support	info@salesforce.com	(212) 555-5555

Opportunities [New Opportunity](#) [Opportunities Help](#)

Action	Opportunity Name	Stage	Amount	Close Date
Edit | Del	Acme - 200 Widgets	Prospecting	\$20,000.00	1/4/2013
Edit | Del	Acme - 600 Widgets	Needs Analysis	\$70,000.00	11/1/2012
Edit | Del	Acme - 1,200 Widgets	Value Proposition	\$1,523,178.00	9/5/2012

Quotes [Quotes Help](#)

Action	Quote Number
Edit | Del	Q1-000000005

Open Activities [New Task](#) [New Event](#) [Open Activities Help](#)

No records to display

All PQW features of the **Projects** tab work in an identical manner to those described in the **Opportunities** tab throughout this guide. The only difference is whether the features are launched from the **Opportunities** tab in the Salesforce StrataVAR PQW Extension or the **Projects** tab of the Embedded Salesforce version. All the same buttons (such as **Import BoM** and **Create New Quote**) and options appear in both tabs.

Account

An **Account** usually represents an end-customer company to whom the VAR is selling. Both Salesforce Opportunities and PQW Projects each belong to a specific Account.

Accounts exist in both the Salesforce StrataVAR PQW Extension (for current Salesforce users) and the Force.com Embedded Salesforce version (for non-Salesforce users).

Each **Accounts** tab shows the related lists of its BoMs and Quotes, along with the standard or customer-related list that comes standard with the platform. For example, as shown below –

Opportunity Detail

Edit

Delete

Clone

Import BoM

Create New Quote

Opportunity Owner

John Yarns DEV1

Private

Opportunity Name

Acme Opp

Account Name

Acme Account

Type

Lead Source

Order Number

Current Generation(s)

Tracking Number

Created By

John Yarns DEV1

6/26/2018 11:57 AM

Description

Custom Links

Deliver Status

Amount

\$550,555.00

Expected Revenue

\$277,777.50

Close Date

6/26/2018

Next Step

Value Proposition

Stage

50%

Primary Campaign Source

Main Competitor(s)

Delivery/Installation Status

Last Modified By

John Yarns DEV1

6/26/2018 11:57 AM

BoMs

Builds help

Action	BoM Number	Record Type	BoM Name	Total Extended List Price	Total Discount	Discount Status	Total Extended Net Price	VPY Payout	Deal Status	Last Modified Date
Edit	Deal	25277388-4711558933	Deal Registration	StatavAR Deal Demo	\$5,841.80	\$1.36	27,159.69		Closed	6/26/2018
Edit	Deal	MS82749363F8	Circo Estimate	StatavAR Estimate Demo	\$16,177.76	\$6.65	193,965.40	3,351		6/26/2018

Quotes

Quotes help

Action	Quote Number	Quote Version	Quote Name	Total Extended List Price	VAR Total Cost	VAR Discount	VAR Total Profit	Total Customer Extended Price	Customer Discount	Active	
Edit	Deal	Q2-000003080	1	Acme Opp	\$55,841.80	\$1.36	\$28,617.50	\$55,841.80	0.00	Active	
Edit	Deal	Q2-000003059	1	Acme Opp	\$316,177.76	\$193,965.39	\$8.65	\$122,212.37	\$316,177.76	0.00	Active

Open Activities

New Task

New Event

Open Activities help

No records to display

Activity History

Log a Call

Mail Merge

Send an Email

Activity History help

No records to display

Notes & Attachments

New Note

Attach File

Notes & Attachments help

No records to display

Contact Roles

New

Contact Roles help

No records to display

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1.3 Workflow – Using StrataVAR PQW



- **Step 1, Getting Started**

Describes how to launch StrataVAR PQW and to get started with CCW credentials, Opportunities and/or Projects.

- **Step 2, Importing from Supplier Quotes**

Describes how to import quotes from supplier sources into StrataVAR PQW, which are then called BoMs. The following types of sources can be imported into StrataVAR PQW –

- Cisco –
 - CCW Estimate
 - CCW Deal Registration/Quote
 - CCWR Quote Maintenance
 - CCWR Sample Invoice Maintenance
- Disti –
 - Quote Excel
 - Ingram Direct Link
- Generic Excel

- **Step 3, Assembling a Quote**

Describes how to collect, group and aggregate the items of the imported BoMs to be included in an exported StrataVAR PQW Quote.

- **Step 4, Pricing – Setting up Prices, Discounts and Margins**

Describes how to price the items in an exported StrataVAR PQW Quote and to define cost, discounts, margins, end-customer price and so on.

- **Step 5, Generating a Customer-facing Quote**

Describes how to export a customer-facing Quote into Excel or a PDF based on the Quote Template for your customer.

1.3.1 Workflow Flexibility

The order of performing a task described above is up to you. You may want to import one or more BoMs of a certain type, and only then start assembling a Quote or you may want to import one or more BoMs of one or more types and then assemble the Quote. It is up to you. You can also import a single BoM, create the Quote, assemble the BoM into the Quote and then go back and import another BoM and assemble them into the Quote.

1.4 How To – Quick Reference

The following provides a quick reference to the pages that describe how to perform various StrataVAR PQW tasks.

1.4.1 How Do I?

- **Launch StrataVAR PQW**, page 19
- **Create an Account**, page 21
- **Select an Account**, page 21
- **Create an Opportunity or Project**, page 21
- **Select an Opportunity or Project**, page 22
- **Filter Tables in PQW Grids**, page 26
- **Apply Operators to a Table Filter**, page 27
- **Clear a Table Filter**, page 27
- **Import a Source**, page 34
- **Define the BoM Type**, page 36
- **Merge a Disti Quote**, page 44
- **Define a Reusable BoM**, page 49
- **Handle a Maintenance BoM**, page 49
- **Define a Maintenance BoM**, page 50
- **Define Quote Aggregation**, page 51
- **Create a Quote Container**, page 58
- **Create a Quote**, page 60
- **Define a Quote**, page 60
- **Use the Quote Notes Library**, page 64
- **List BoMs for Selection**, page 69
- **Filter the BoMs List**, page 71
- **Select the BoMs to Be Included in a Quote**, page 71
- **Copy Items into a Quote**, page 72
- **Select the BoM Items to Be Copied into a Quote**, page 72
- **Specify the Quantity of the BoM Boxes/Items**, page 75
- **Edit a Quote**, page 77
- **Define the Pricing Operation**, page 82
- **Adjust the Pricing of Specific Items**, page 85
- **Apply a Markup to a Quote**, page 86
- **Generate a Quote**, page 94

1.4.2 What Does This Do?

- **Attach Disti Button**, page 45
- **Attach File to BoM Button**, page 46
- **Continue to BoM Button**, page 38
- **Continue to Quote Button**, page 96
- **Create BoM**, page 34
- **Create New Quote Button**, page 59
- **Edit Button**, page 33
- **Export to Excel Button**, page 49
- **Export Quote Button**, page 95
- **Go Button**, page 29
- **Import Another BoM Button**, page 40
- **Import BoM Button**, page 34
- **New Opportunity Button**, page 23
- **New Project Button**, page 23
- **New Quote Button**, page 59
- **Open BoM CCW Button**, page 43
- **Quick Add to Quote Button**, page 72
- **Refresh BoM Button**, page 43
- **Search Box**, page 41
- **Update Selected Items Button**, page 84
- **View All Button**, page 47
- **View Errors Button**, page 47

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Quick Tour of the Interface

This chapter describes how to launch StrataVAR PQW and to get started with CCW Accounts, Opportunities and/or Projects. This chapter also provides a quick tour of the common features in the StrataVAR PQW user interface.

2.1 Getting Started

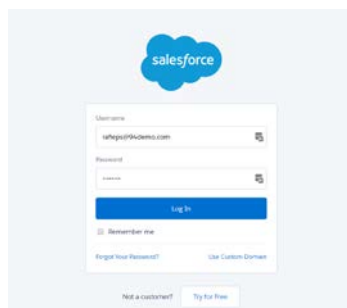
The following describes how to get up and running using StrataVAR PQW. If assistance is required, you may contact support at help@StrataVAR.com.

2.1.1 Launching StrataVAR PQW

Browser Requirements – The latest version of Firefox, Chrome, Microsoft Edge or Internet Explorer 9 and up.

► To log into StrataVAR PQW –

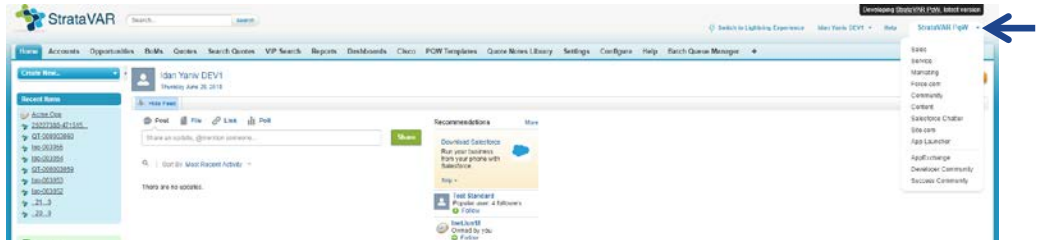
- 1 For current Salesforce users (using the Salesforce StrataVAR PQW Extension), log into Salesforce.com using your usual username and password.
– OR –
For non-Salesforce users (using the Embedded Force.com version), log into the following page using the credentials provided to you by StrataVAR –



- 2 Only existing Salesforce users (using this StrataVAR PQW Extension) must perform this step in order to add the strata VAR features to the user interface.

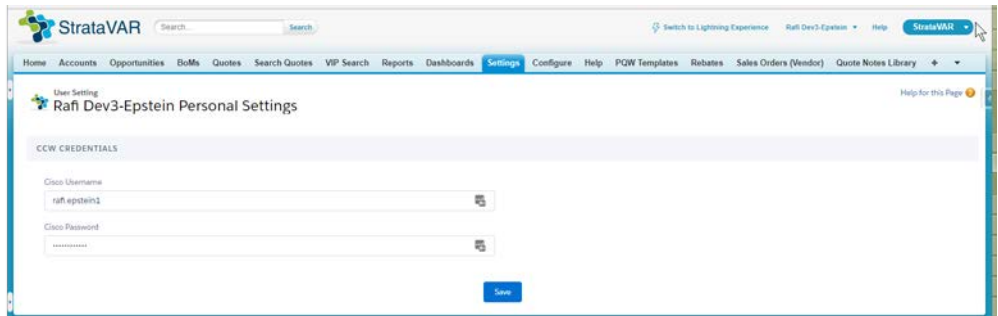
Non-Salesforce users (using the Embedded Salesforce version) can skip this step.

From the application selector at the top right of the window, select **StrataVAR PqW**.



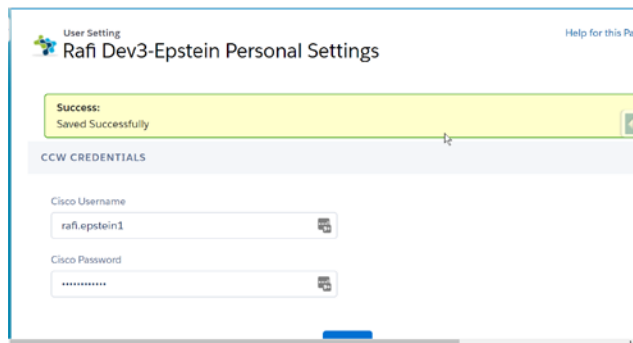
- 3 From now on all steps are the same for both types of users.

Select the **Settings** tab and enter your CCW credentials in order to enable StrataVAR PQW to access the data in CCW, as shown below. PQW users have access to the same Cisco Estimates and Quotes as defined by their CCW credentials –



- 4 Click the **Save** button to see the following yellow success message –

Note — If the window does not display **Success**, then the credentials are probably incorrect. In this case, log in directly to CCW to check the validity of the credentials.



Congratulations. You are up and running!

2.1.2 Creating or Selecting an Account

An **Account** usually represents an end-customer company to whom the VAR is sending a Quote. In order to start working with your StrataVAR PQW Quotes, you must first create or select the Account to which the Quote belongs, as described below.

► **To create or select an Account –**

- 1 Select the **Accounts** tab. The following displays listing all the currently defined Accounts –

[illegible]

You can click an Account name to select it.

- 2 Click the **New** button. The following displays –

The screenshot shows a web-based form for creating a new account. The form is titled "Account Edit" and "New Account". It has a sidebar on the left with "Recent Items" and "Recycle Bin" links. The main form area is divided into three sections: "Account Information", "Additional Information", and "Account Discounts". The "Account Information" section includes fields for "Account Owner" (Barbara Sher), "Account Name", "Parent Account", "Phone", "Fax", and "Website". The "Additional Information" section includes fields for "Type", "Industry", "Description", "Billing Street", "Billing City", "Billing State/Province", "Billing Zip/Postal Code", "Billing Country", "Shipping Street", "Shipping City", "Shipping State/Province", "Shipping Zip/Postal Code", "Shipping Country", "Employees", and "Annual Revenue". The "Account Discounts" section includes fields for "VAR Discount HW" and "VAR Discount Service". The form has "Save", "Save & New", and "Cancel" buttons at the top and bottom.

Note – The fields that display may vary from those shown, depending on customization.

- 3 Fill out the Account information and click the **Save** button.

2.1.3 Creating/Selecting an Opportunity or Project

For current Salesforce users, the StrataVAR PQW playing field takes place in the **Opportunities** tab of the Salesforce StrataVAR PQW Extension. For non-Salesforce users, the StrataVAR PQW playing field takes place in the **Projects** tab of the Embedded Salesforce version that is automatically provided with StrataVAR PQW.

In order to start working with your StrataVAR PQW Quotes, you must create or select the Opportunity or Project (according to the platform on which you are working, as described above) to which the Quote belongs, as described below.

► **To create a new Opportunity –**

- 1 Select the **Accounts** tab to display a list of existing Accounts, as shown above.
- 2 Click an Account to open it.
- 3 Scroll down to the **Opportunities** related list, shown below –

The screenshot shows the 'Accounts' page in StrataVAR. At the top, there's a 'System Information' bar with 'Created By' and 'Last Modified By' details. Below that is a 'Custom Links' section with buttons for 'Google Search', 'Google Maps', and 'Google News'. The main section is 'Contacts', which includes a table of contact information. Below the 'Contacts' section is the 'Opportunities' section, which is highlighted with a blue arrow. The 'Opportunities' section has a 'New Opportunity' button and a table of existing opportunities. Below 'Opportunities' is a 'Quotes' section with a 'New Quote' button. At the bottom is an 'Open Activities' section with 'New Task' and 'New Event' buttons.

Action	Contact Name	Title	Email	Phone
Edit | Del	Howard Jones	Buyer	info@salesforce.com	(212) 555-5555
Edit | Del	Edward Barnes	President and CEO	info@salesforce.com	(212) 555-5555
Edit | Del	Leanne Thomas	VP Customer Support	info@salesforce.com	(212) 555-5555

Action	Opportunity Name	Stage	Amount	Close Date
Edit | Del	Acme - 1200 Widgets	Prospecting	\$25,000.00	5/4/2013
Edit | Del	Acme - 100 Widgets	Needs Analysis	\$75,000.00	11/1/2012
Edit | Del	Acme - 1200 Widgets	Value Proposition	\$1,525,178.00	9/5/2012

- 4 Click the **New Opportunity** button. The following displays –

The screenshot shows the 'New Opportunity' form in StrataVAR. The form is titled 'Opportunity Edit' and has buttons for 'Save', 'Save & New', and 'Cancel'. It is divided into several sections: 'Opportunity Information', 'Categorized Financial Data', 'Additional Information', and 'Description Information'. The 'Opportunity Information' section includes fields for 'Opportunity Owner', 'Opportunity Name', 'Account Name', 'Type', 'Primary Campaign Source', 'Close Date', 'Stage', 'Priority', and 'Amount'. The 'Categorized Financial Data' section includes fields for 'Product Revenue', 'Product Cost', 'Maint. Revenue', 'Maint. Cost', 'SaaS Revenue', 'SaaS Cost', 'Software Revenue', 'Software Cost', 'Prof. Services Revenue', 'Prof. Services Cost', 'Training Revenue', and 'Training Cost'. The 'Additional Information' section includes fields for 'Lead Source' and 'Next Step'. The 'Description Information' section includes a 'Description' field. Mandatory fields have a red bar on their left.

Mandatory fields have a red bar on their left.

Opportunity Name

- 5 Fill out the Account information and click the **Save** button.

► **To create a new Project –**

- 1 Select the **Accounts** tab to display a list of existing Accounts.
- 2 Click an Account to open it.
- 3 Scroll down to the **Projects** related list, shown below –

The screenshot shows a CRM interface with a sidebar on the left. The main content area is titled 'System Information' and includes a 'Custom Links' section. Below this, there are three tabs: 'Contacts', 'Opportunities', and 'Quotes'. The 'Opportunities' tab is selected, and a blue arrow points to it. The 'Opportunities' section displays a table with columns: 'Action', 'Opportunity Name', 'Stage', 'Amount', and 'Close Date'. The table contains three rows of data. Below the table, there are sections for 'Quotes' and 'Open Activities'.

Action	Contact Name	Title	Email	Phone
Edit | Del	Howard Jones	Owner	info@salesforce.com	(212) 555-5555
Edit | Del	Edward Barnes	President and CEO	info@salesforce.com	(212) 555-5555
Edit | Del	Leanne Thomas	VP Customer Support	info@salesforce.com	(212) 555-5555

Action	Opportunity Name	Stage	Amount	Close Date
Edit | Del	Acme - 1200 Widgets	Prospecting	\$25,000.00	1/4/2013
Edit | Del	Acme - 1200 Widgets	Needs Analysis	\$75,000.00	11/1/2012
Edit | Del	Acme - 1200 Widgets	Value Proposition	\$1,525,178.00	9/5/2012

- 4 Click the **New Project** button. The following displays –

The screenshot shows the 'New Opportunity' form. The form is titled 'Opportunity Edit' and includes a 'Save' button. The 'Opportunity Information' section contains fields for 'Opportunity Owner', 'Opportunity Name', 'Account Name', 'Type', and 'Primary Campaign Source'. The 'Categorized Financial Data' section includes fields for 'Product Revenue', 'Product Cost', 'Maint. Revenue', 'Maint. Cost', 'SaaS Revenue', 'SaaS Cost', 'Software Revenue', 'Software Cost', 'Prof. Services Revenue', 'Prof. Services Cost', 'Training Revenue', and 'Training Cost'. The 'Additional Information' section includes fields for 'Lead Source' and 'Next Step'. The 'Description Information' section includes a 'Description' field.

- 5 Fill out the Account information and click the **Save** button.

2.2 StrataVAR PQW User Interface

StrataVAR PQW operates inside Salesforce and appears as additional tabs, buttons and related lists. This user guide only describes a few common StrataVAR PQW user interface features and does not attempt to describe the standard features of Salesforce.

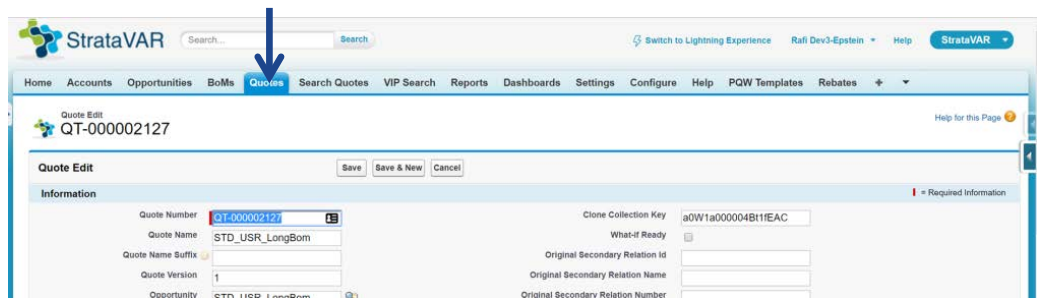
All StrataVAR PQW users have an **Account** and a **Contact** tab, in addition to the **BoMs** and **Quotes** PQW tabs.

Current Salesforce users (using the Salesforce StrataVAR PQW Extension), have an **Opportunities** tab, in addition to a variety of other standard Salesforce tabs.

Non-Salesforce users (using the Embedded Force.com version) have a **Projects** tab.

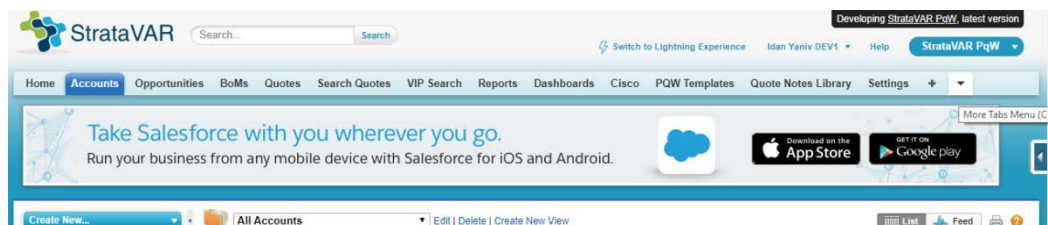
2.2.1 StrataVAR PQW Tabs

Salesforce provides a variety of types of functionality, most of which can be accessed by selecting one of the tabs at the top of the Salesforce window. For example, the following shows the **Quotes** tab selected –

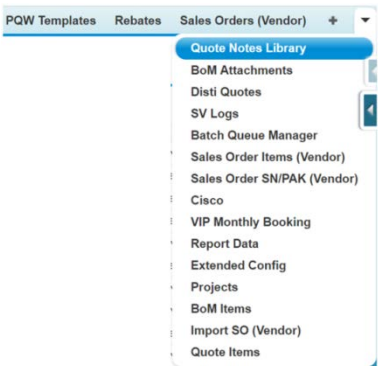


Selecting a tab displays the relevant page underneath and enables access to the functionality associated with it.

When so many tabs are available that they cannot be displayed in a single view across the top of the page, the right side of the page shows a down arrow, as shown below –



Clicking this down arrow opens a dropdown menu of additional tab options. Simply click an option in the dropdown menu to display its page. For example, as shown below –



2.2.2 Filtering Tables in PQW Grids

StrataVAR PQW provides a variety of tables that can be filtered. For example, the following shows the filter bar for BoMs.

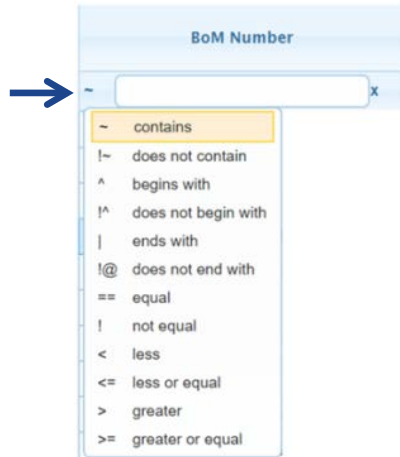


Entering text into each of the filter column fields automatically filters the rows displayed in the table.

An **AND** relationship exists between the filters, so that entering a filter value in more than one column filters the table to only show BoMs that match all these criteria.

Applying Operators to a Table Filter

Each column filter provides an operator icon to the left of the white field, which you can click in order to display a dropdown menu of operators to be applied to the value that you enter in the filter, as shown below –

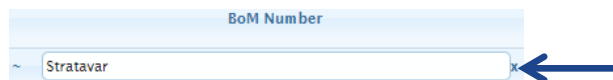


For example, if you select the **contains** operator in the BoM number and enter the value **123**, then only BoMs that have the value **123** in this column are listed.

Clearing a Table's Filter

► To clear a filter in the table –

Click the **X** icon to its right.




2.2.3 Object Relationships

In PQW, relationships are created between objects that link the objects with each other so that when a user views a specific object, they can also see related data.

In Salesforce, the  icon represents a lookup relationship between objects.

For example, when editing a Quote, you can select the parent Opportunity to which it belongs.

The screenshot shows the 'Quote Edit' page for quote QT-000002127. The 'Information' section contains various fields. The 'Opportunity' field is set to 'STD_USR_LongBom'. A blue arrow points to the magnifying glass icon next to this field, indicating a lookup action.


Clicking the  icon displays a lookup window in which you can select one of the existing related objects (such as an **Opportunity**). For example –

The screenshot shows a 'Lookup' window in a browser. The search field contains the text 'test'. Below the search field, there is a 'Search Results' table. A blue arrow points to the 'Opportunity Name' column header of this table.

Opportunity Name	Account Name	Account Site
Test Company 1	Test Company 1	Test Company 1
Test Company 2	Test Company 2	Test Company 2
Generic Excel	Test Company 2	Test Company 2
Test Company 3	Test Company 3	Test Company 3
Test Company 4	Test Company 4	Test Company 4
Test Company 5	Test Company 5	Test Company 5
Test Company 6	Test Company 6	Test Company 6
Test Company 7	Test Company 7	Test Company 7
Test Company 8	Test Company 8	Test Company 8
Test Company 9	Test Company 9	Test Company 9
Test Company 10	Test Company 10	Test Company 10
Test Company 11	Test Company 11	Test Company 11
Test Company 12	Test Company 12	Test Company 12
Test Company 13	Test Company 13	Test Company 13
Test Company 14	Test Company 14	Test Company 14
Test Company 15	Test Company 15	Test Company 15
Test Company 16	Test Company 16	Test Company 16
Test Company 17	Test Company 17	Test Company 17
Test Company 18	Test Company 18	Test Company 18
Test Company 19	Test Company 19	Test Company 19
Test Company 20	Test Company 20	Test Company 20

The search field at the top of the window (shown above) enables you to type in any text that appears in the metadata of the Opportunity in order to find it. You can use wildcards, such as an asterisk (*). A minimum of two characters is required.

StrataVAR PQW makes sure to only offer a selection of objects that you are allowed to pick.





If a value has already been selected for a field (for example, as shown below), then you can display that selected object by clicking the  icon to display the lookup window above, clicking the **Go** button and then clicking the opportunity name displayed in the list.

Account Name 

2.2.4 Table (Grid) Row Pagination

The top of each table provides a dropdown menu that enables you to specify how many rows appear in each page of the table, as shown below –

Quote: [QT-000002127](#) - [STD_USR_LongBom](#) (Account: [idan_test](#))

Page 1 of 6    

10 ▼

- 5
- 10
- 20
- 50
- 100
- 250
- 500
- 1000
- 2500

This area also provides forward and back arrow buttons that enable you to navigate from page to page, as well as to the first or last page.

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Importing Sources – Creating BoMs

This chapter describes how to import quotes from suppliers into StrataVAR PQW, which are then called *BoMs*. The imported BoM remains almost always identical to the source quote from the supplier. Typically, changes are not made to the BoM, except when merging cost from a Disti to a BoM imported from CCW.

3.1 Importing – Introduction

Sources – Supplier Quotes

StrataVAR PQW enables the import of item lists from external data sources, including CCW Estimates, Deal Registration Quotes, CCW-R Maintenance Quotes, Distribution and the VAR's own Professional Services data or parts. Typically, this list of items is called a *quote* by the suppliers.

Sources for importing items into BoMs in StrataVAR PQW include the following –

- Cisco
 - CCW Estimate
 - CCW Deal Registration/Quote
 - CCW-R Quote Maintenance
 - CCW-R Invoice Maintenance
- Disti
 - Excel Quote
 - Ingram Deal API
- Generic Excel

These require special handling during BoM input and Quote creation. All of the above result in a BoM in StrataVAR PQW. StrataVAR PQW provides special features for handling the input of CCW-Request Maintenance. The special features are described starting on page 55.

BoMs in StrataVAR PQW

A typical process of creating a Quote in StrataVAR PQW requires importing one or more BoMs

As supplier quotes are imported into StrataVAR PQW, they are each normalized and converted into BoMs in the same format in StrataVAR PQW. This normalization process creates the same type of BoM in StrataVAR PQW regardless of the source of the quote.

After being imported, each BoM appears as a Related List under the **Opportunities** or **Project** tab to which it was imported. An Opportunity or Project can have multiple BoMs, but a BoM can only belong to a single Opportunity or Project.

Each line in the BoM is called a BoM Item and is shown as a related list under the BoM). Each line describes a specific item type, the quantity of that item and its cost, in addition to a variety of other types of information about that item. The data that is imported into StrataVAR PQW depends on the information provided by the supplier source.

Editing a BoM

After a supplier source has been imported into StrataVAR PQW and becomes a BoM, it is not modified automatically by StrataVAR PQW, regardless of whether some or all of its items are added to a Quote in StrataVAR PQW.

In StrataVAR PQW, information that was missing from the imported supplier source appears in StrataVAR PQW empty. If needed, this missing information can be manually entered by you into each BoM line in StrataVAR PQW, as described below.

It is recommended not to manually change BoM data or BoM items, nor to manually add or delete BoM Items. We recommend making all changes in the PQW quote.

► **To view or edit a BoM in StrataVAR PQW –**

- 1 Select the **BoMs** tab to display a list of previously imported BoMs. Alternatively, you can select the **Recently Used** option or you can click the **Go** button to display the complete list.

– OR –

Select the **Opportunities/Projects** tab, click one of the **Opportunity Names** in the last and scroll down to the related list of BoMs.

- 2 Click one of the BoM numbers in the list to enter View mode.
- 3 Click the **Edit** button.
- 4 Fill in the fields, as necessary, and click the **Save** button.

► **To edit a BoM in CCW –**

- Use the **Open BoM CCW** button, as described on page 36. You can refresh the BoM in PQW by clicking the **Refresh BoM** button.

Reusable BoMs

Each BoM is imported under a specific **Opportunity** or **Project**. In addition, some BoMs can be defined as reusable (as described on page 49), meaning that they can be used under another **Account, Opportunity** or **Project**. These BoMs can be assembled into a Quote in any Opportunity or Project.

3.2 Importing – How To

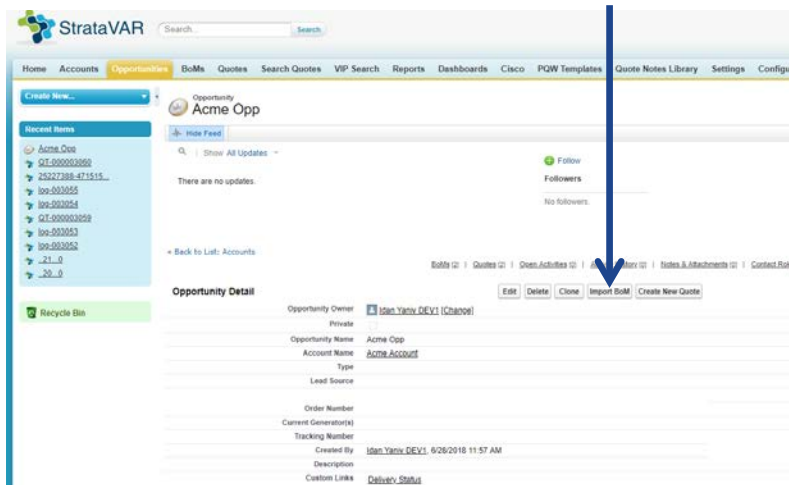
The importing of supplier sources into StrataVAR PQW in order to create BoMs comprises the following steps –

- **Clicking the Import BoM Button**, page 34
- **Defining the BoM Type**, page 36
- **Clicking the Import Button**, page 40

Clicking the Import BoM Button

► To access the import BoM button –

For current Salesforce users (using the Salesforce StrataVAR PQW Extension), in the **Opportunities** tab, click the **Import BoM** button.



The StrataVAR PQW **BoMs** and **Quotes** of this Opportunity appear as related lists as shown below –

EditDeleteCloneImport BoMCreate New Quote

BoMs

Action	BoM Number	Record Type	BoM Name	Total Extended List Price	Total Discount	Discount Status	Total Extended Net Price	VP Payroll	Deal Status	Last Modified Date
Edit | Del	25227388-4715158933	Deal Registration	StrataVAR Deal Demo	\$5,841.80	\$1.36		27,159.49		Closed	6/28/2018
Edit | Del	M0327493502B	Cisco Estimate	StrataVAR Estimate Demo	\$16,177.76	\$8.65		193,965.40	3,351		6/28/2018

Quotes

Action	Quote Number	Quote Version	Quote Name	Total Extended List Price	VAR Total Cost	VAR Discount	VAR Total Profit	Total Customer Extended Price	Customer Discount	Active
Edit | Del	QT-0000000269	1	Acme Opp	\$55,841.80	\$27,164.30	\$1.36	\$28,677.50	\$55,841.80	0.00	✓
Edit | Del	QT-0000000269	1	Acme Opp	\$316,177.76	\$193,965.39	\$8.65	\$122,212.37	\$316,177.76	0.00	✓

Open Activities

New TaskNew Event

No records to display

Open Activities Help

Activity History

Log a CallMail MergeSend an Email

No records to display

Activity History Help

Notes & Attachments

New NoteAttach File

No records to display

Notes & Attachments Help

Contact Roles

New

No records to display

Contact Roles Help

Partners

New

No records to display

Partners Help

Competitors

New

No records to display

Competitors Help

Stage History

Stage	Amount	Probability (%)	Forecasted Revenue	Close Date	Last Modified
-------	--------	-----------------	--------------------	------------	---------------

Stage History Help

– OR –

For non-Salesforce users (using the Embedded Salesforce version), in the **Projects** tab, click the **Import BoM** button.

StrataVAR

Switch to Lightning ExperienceForce Desk PlatformHelpStrataVAR

HomeAccountsProjectsBoMsQuotesSearch QuotesVP SearchReportsDashboardSettingsPQW TemplateQuote Notes LibrarySales Orders (Vendor)Sales Order Bank (Vendor)Sales Order SNAIFK (Vendor)Import SO (Vendor)Quote Items

Project

Testing Project2

Switch to Lightning ExperienceForce Desk PlatformHelpStrataVAR

Project Detail

Edit | Del | Clone | Import BoM | Create New Quote

Project Name: Testing Project2

Account: US-0001-BoM-1

Owner: Force Desk Platform (Owner)

Created By: Force Desk Platform 14/29/17 12:36 AM

Project Number: PRN-0000000491

Last Modified By: Force Desk Platform 14/29/17 12:36 AM

Edit | Del | Clone | Import BoM | Create New Quote

BoMs

Action	BoM Number	Record Type	BoM Name	Total Extended List Price	Total Discount	Discount Status	Total Extended Net Price	VP Payroll	Deal Status
Edit | Del	US-0001-BoM-1	Cisco Estimate	College of the Albemarle - FY16-17 Annual Quote - 20170126	23,476.00	30.00		14,319.78		
Edit | Del	21146202	Maintenance BoM	31146202-Quote Created by Cisco Impact	3,300.00	23.30		2,561.00		W88
Edit | Del	US-0001-BoM-1	Maintenance BoM	38179002-Burton County Schools	0.00	0.00		0.00		W88
Edit | Del	21146202	Maintenance BoM	38179002-Burton County Schools	\$8,956.16	37.99		38,428.61		W88
Edit | Del	21146202	Maintenance BoM	21146202	\$19,723.14	37.30		\$73,757.38		W88

Quotes

Action	Quote Number	Quote Name	Account	Total Extended List Price	VAR Total Cost	VAR Discount	VAR Total Profit	Total Customer Extended Price	Customer Discount
Edit | Del	US-0001-BoM-1	Testing Project2	US-0001-BoM-1	\$1,444,511.39	\$203,062.89	30.00	\$196,347.00	\$1,062,249.00	32.10
Edit | Del	US-0001-BoM-1	Testing Project2	US-0001-BoM-1	\$1,442,751.39	\$203,113.17	30.00	\$195,335.11	\$1,066,403.00	32.20
Edit | Del	US-0001-BoM-1	Testing Project2	US-0001-BoM-1	\$42,456.00	\$77,796.75	\$4.52	\$3,371.42	\$36,666.17	27.35
Edit | Del	US-0001-BoM-1	Testing Project2	US-0001-BoM-1	\$0.00	\$0.00	0.00	\$0.00	\$0.00	0.00
Edit | Del	US-0001-BoM-1	Testing Project2	US-0001-BoM-1	\$20,306.00	\$23,006.00	24.15	\$1,339.66	\$24,006.00	19.25

Notes & Attachments

New Note | Attach File

No records to display

Notes & Attachments Help

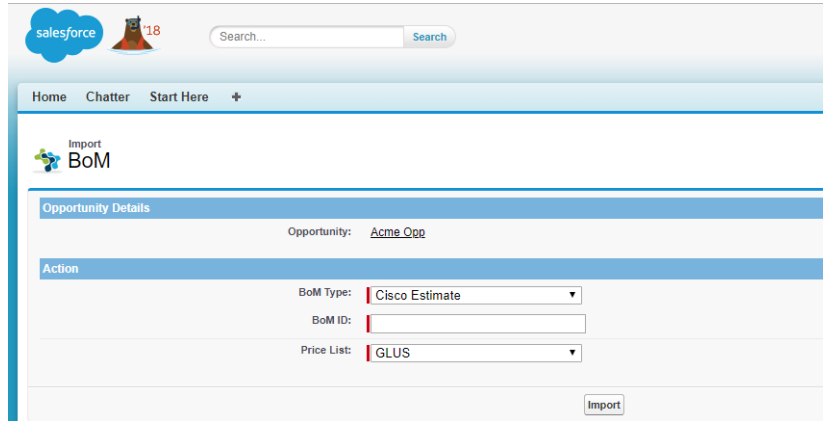
The StrataVAR PQW **BoMs** and **Quotes** of this Project appear as related lists as shown above.

Defining the BoM Type

The BoM type specifies the type of source.

► To define the BoM type –

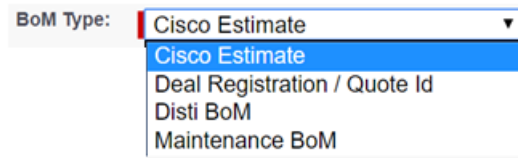
- 1 The **BoMs** tab opens, as shown below –



The screenshot shows the Salesforce 'Import BoM' interface. At the top, there's a navigation bar with 'Home', 'Chatter', and 'Start Here'. Below this, the 'Import BoM' section is active. It displays 'Opportunity Details' for 'Acme Opp'. In the 'Action' section, there are three fields: 'BoM Type' (a dropdown menu currently showing 'Cisco Estimate'), 'BoM ID' (an empty text field), and 'Price List' (a dropdown menu currently showing 'GLUS'). An 'Import' button is located at the bottom right of the form.

Note – The window above shows a BoM being imported into an Opportunity. However, importing a BoM into a Project is the same.

From the **BoM Type** field, select the type of source to be imported (and to become a BoM) in StrataVAR PQW, as follows –



A close-up of the 'BoM Type' dropdown menu. The menu is open, showing a list of options: 'Cisco Estimate' (which is highlighted in blue), 'Deal Registration / Quote Id', 'Disti BoM', and 'Maintenance BoM'.

According to the type of BoM that you select from this dropdown menu, StrataVAR PQW activates the relevant internal API that handles each type of source.

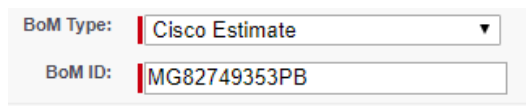
Generally, no preparation is required of these source files. StrataVAR PQW handles various formats of Disti BoMs. If it happens that you are trying to import a new unsupported Disti BoM format and you get an error message, then contact StrataVAR customer support for assistance.

- 2 Different fields are displayed for you to fill in for each type of source that you select from the dropdown menu. The following BoM types are available. The procedure for handling each one as described below –

- **Cisco Estimate**, page 37
- **Deal Registration**, page 37
- **Disti BoM**, page 38
- **Maintenance BoM**, page 38

Cisco Estimate

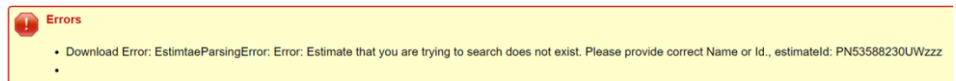
A Cisco estimate imports an estimate from CCW, based on the estimate ID. For more details, see page 38.



BoM Type:

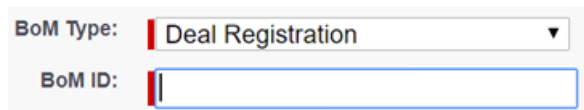
BoM ID:

- **BoM ID** – Enter the CCW estimate ID. If the estimate ID that you enter here does not exist in CCW, then an error message is displayed. For example, as follows –



Deal Registration

In this field, you to enter either the Deal ID or the quote number from CCW.



BoM Type:

BoM ID:

Default discounts are defined at a global level and Account level. ===

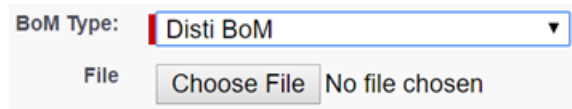
When importing an estimate, StrataVAR PQW uses the VAR Discount from the CCW estimate, if one is defined. If one is not defined, StrataVAR PQW uses account-level discounts for hardware and SMARTnet, if defined for the parent account. If this value is not defined for the Account, StrataVAR PQW uses global discounts, as defined by the System Administrator. In all cases, the VAR Discount/Cost can be easily modified later, if necessary.

The **BoM ID** field is the same as described above.

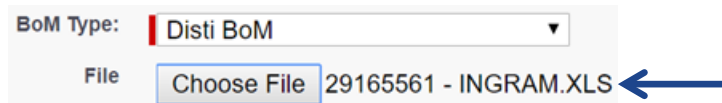
Disti BoM

This field is used when importing a quote from distributors in a known format, in order for PQW to automatically parse the information. The following Distis are supported –

- IngramMicro
- TechData
- Westom/Comstor
- Arrow
- A custom, generic format that can be downloaded from the StrataVAR help portal at <https://help.stratavar.com/> (requires that you log in)

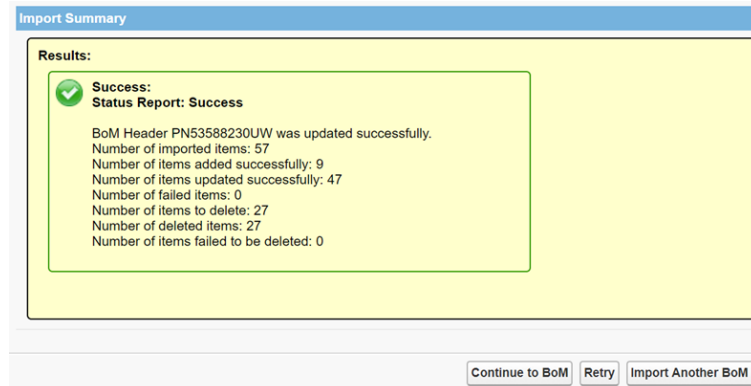


- **File** – Click the **Choose File** button in order to select an external Excel file from a distributor. This file must be in one of the Disti Excel sheet formats supported by StrataVAR PQW. The file name is then displayed –



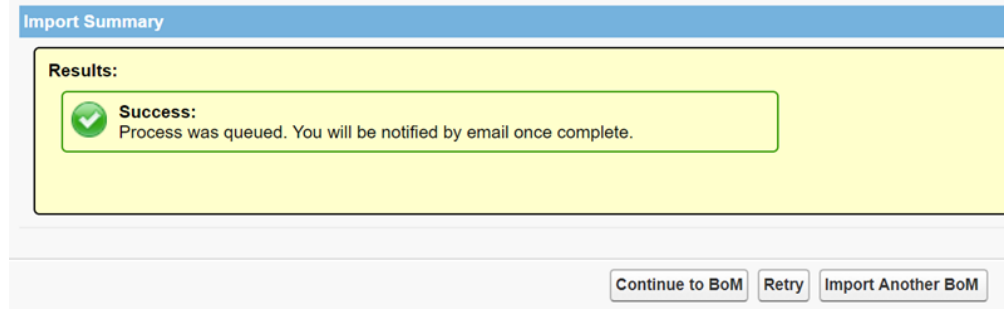
Long Cisco Estimates, Deal Registrations or Disti BoMs

The following message is displayed for a standard length **Estimate, Deal Registration** or **Disti BoM**, meaning that it does not have a huge amount of items in it –

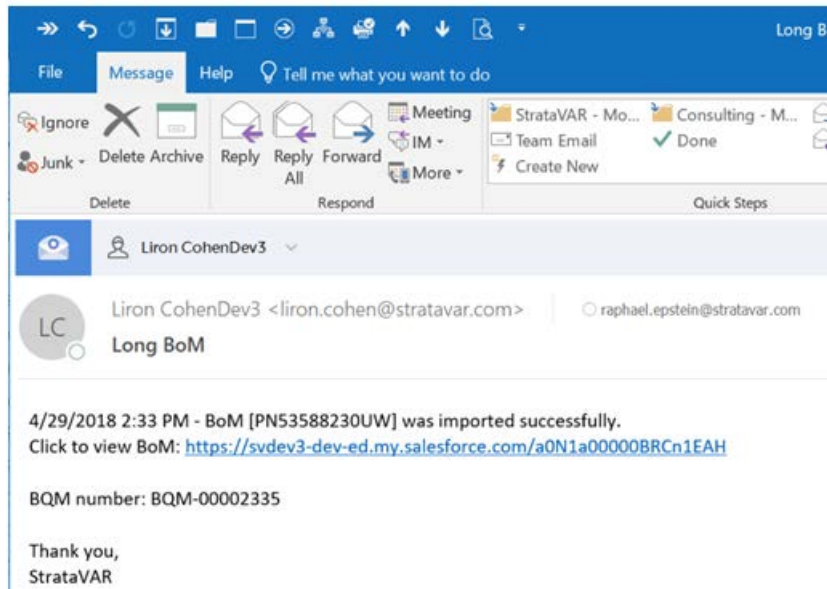


You can click the **Continue to BoM** button to display the imported items, or the **Import Another BoM** button to import another quote.

The following message is displayed if the estimate is more than 1,000 items (lines) long –



In this case, you should wait for the arrival of an email that contains a link to the BoM in Salesforce. For example, as shown below –



Maintenance BoM

This type of CCW BoM is also called SMARTnet. The process for handling both types of Maintenance BoMs (**CCW-R Quote** and **CCW-R Invoice**) in StrataVAR PQW differs from that of handling the other types of BoMs (described above).

CCW-R quotes contain numerous items (1,000s to 100,000s), which often present scalability issues for the quoting system. PQW provides several special capabilities to address these issues –

- PQW uses batch operations that can handle 100,000s of records. Batch operations are unlike regular PQW BoMs and Quotes, whose operations are less interactive.
- PQW automatically creates a Maintenance Quote from the CCW-R BoM.
- PQW can optionally aggregate a long Quote based on multiple field values, in order to reduce the number of quote lines sent to the end-customer.
- PQW can automatically handle 2-tier CCW-R quotes, by creating a dual BoM for SMS and a detailed list, as well as a dual Quote.

Handling of Maintenance BoMs is described on page 49.

BoM Type:	Maintenance BoM
Source:	CCW-R Quote
Import Into Existing Quote:	--None--
Quote Aggregated By:	None
Type:	Quote Number Id
Quote ID:	361018107

Clicking the Import Button

► To start the import process –

- 1 Click the **Import** button. The operation is executed in the background to support scalability. An email notification is sent to you after the supplier quote has finished being imported, and the Quote has been generated containing links to this BoM (or two BoMs) and Quote (or two Quotes) in StrataVAR PQW.
- 2 If you click the link in the email (shown above), then a standard Salesforce **BoM Details** tab displays.

3.3 BoM Details Tab

► **To access BoMs Details –**

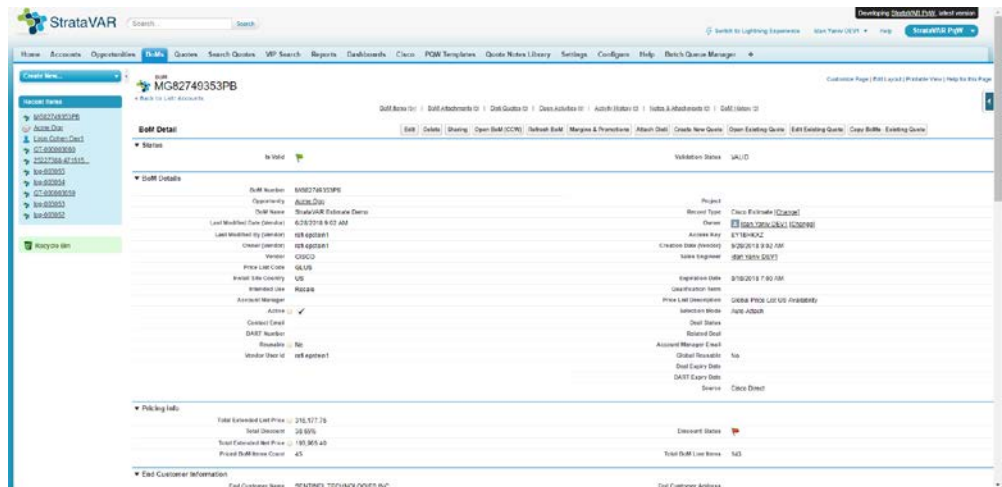
- 1 Select the **BoMs** tab to display a list of previously imported BoMs.

- OR -

Select the **Opportunities/Projects** tab, click one of the **Opportunity Names** in the list and scroll down to the related list of BoMs.

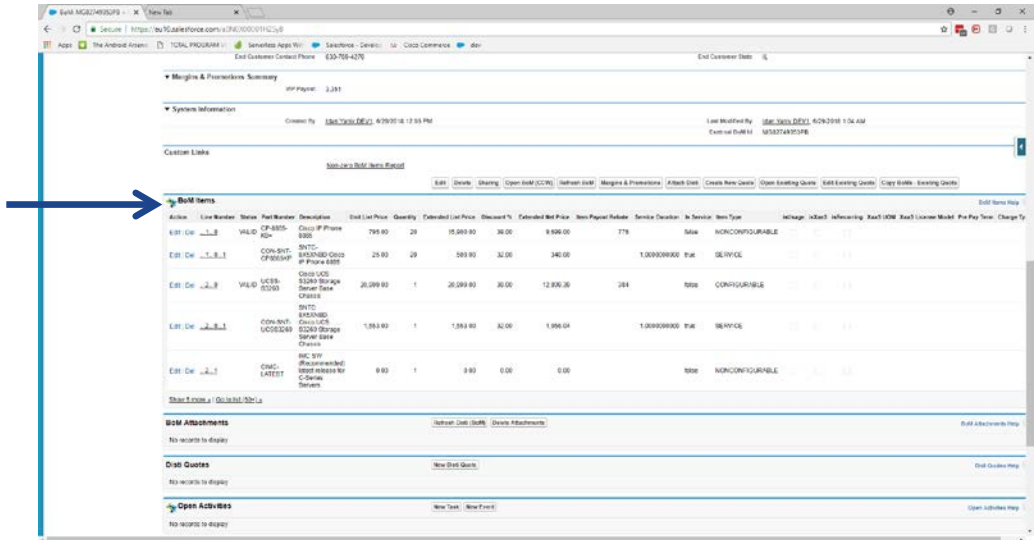
You can also use the **Search** box at the top of the window to search for a BoM or another entity. Wildcards can be used in this field.

- 2 Click one of the BoM numbers in the list.

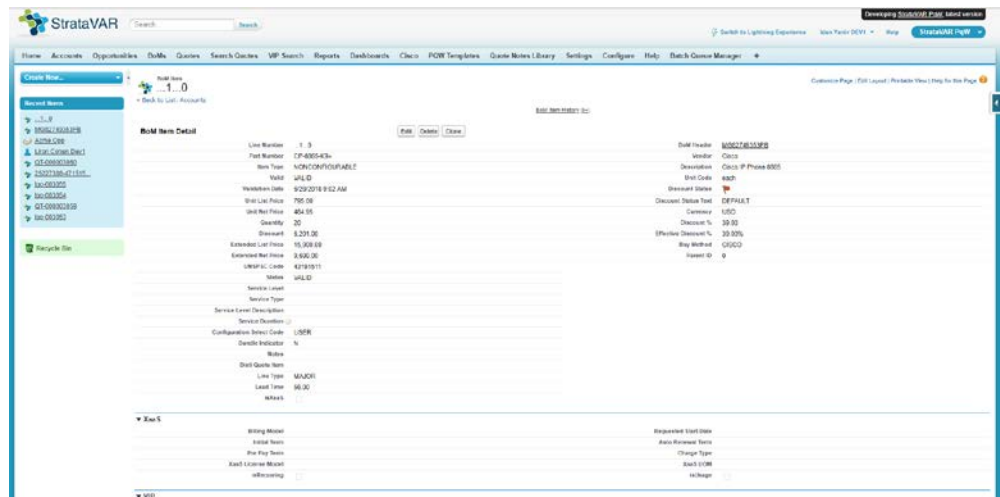


Note – The layout of this page may appear differently than shown above, because you can customize the layout to specify which fields are displayed and their location on the page.

Scroll down to the related list of BoM items, as shown below –



- To display the details of a specific item in the BoM, click one of the **Line Numbers** in the BoMs items related list. The following displays –



Buttons are available for editing, deleting and cloning this BoM item, as shown above.

3.3.1 BoM Detail Buttons

StrataVAR PQW provides the following special buttons in the **BoMs Details** tab –

[Edit](#) [Delete](#) [Sharing](#) [Open BoM \(CCW\)](#) [Refresh BoM](#) [Margins & Promotions](#) [Attach Disti](#) [Create New Quote](#) [Open Existing Quote](#) [Edit Existing Quote](#) [Copy BoMs - Existing Quote](#)

Open BoM CCW Button

This button opens this BoM in CCW, which enables you to edit it in CCW. This means that this BoM opens in the standard CCW interface (not in StrataVAR PQW).

Note – After a quote has been imported into StrataVAR PQW and has become a BoM, then this BoM is not modified by StrataVAR PQW, regardless of whether the source from which it was imported has changed.

There is one exception to this rule – the **Refresh BoM** button. If changes are made to items in a source that was previously imported into PQW and became a BoM (for example, a Disti Quote), then in order to update the prices in that BoM in PQW, you must use the **Refresh BoM** button, as described below. For example, to change the quantity of items, in order to add additional routers or to delete items.

Refresh BoM Button

After a quote has been imported into StrataVAR PQW and has become a BoM, then this BoM is not modified by StrataVAR PQW, regardless of whether the source from which it was imported has changed.

However, what happens if the user changes the originally imported source (such as a Disti quote)? For example, by changing the price of an item that is now in a PQW BoM.

In this case, the BoM must be refreshed in StrataVAR PQW by clicking the **Refresh BoM** button in the BoM Details page.

In addition, the PQW Quotes that use the updated items from this BoM must also be refreshed using the **Copy BoMs to Quote** button, as described in on page 72. In this process you must select the relevant BoM items and then copy them into the Quote again. There is no need to copy the entire BoM again, just the specific items that were changed.

3.3.2 Disti Quote Merge

When a VAR purchases from a Distributor, the Disti Quote specifies the cost of items to be charged by the Distributor to a VAR. In this case, the VAR is purchasing from a Distributor and not directly from Cisco. This may be done –

- By Tier 2 VARs, who by definition only purchase from distributors.
- By Tier1 VARs who generally purchase directly from Cisco, but now have decided to purchase something from a distributor.

The Disti Quote usually specifies the List Price, Quantity and VAR Cost that StrataVAR PQW will insert into the BoM. It also does not show the zero price items and the hierarchical structure imposed by CCW.

The items in the quote that you get from the Disti *should be* the same items received in the original CCW BoM; however, it almost never is. Discrepancies may occur because of a variety of reasons, including human error.

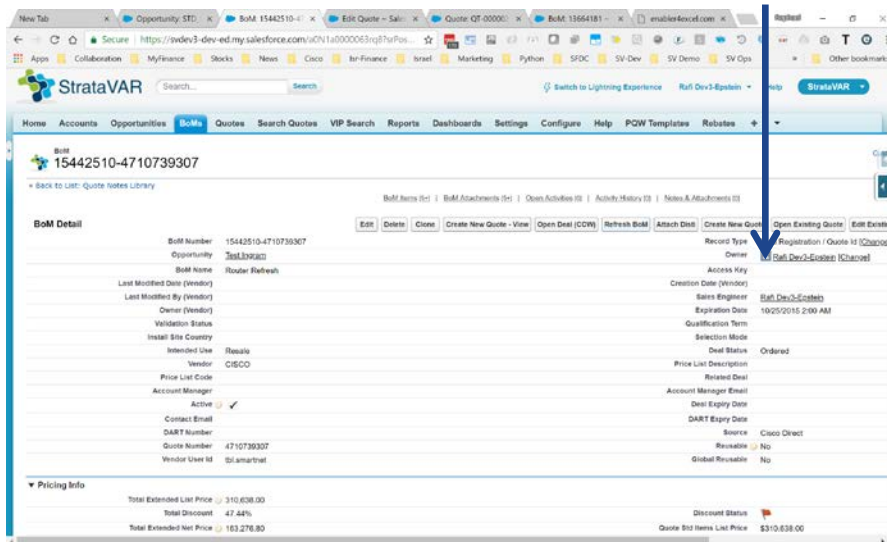
The purpose of a Disti Quote Merge is to compare the quote received from a Disti with the original CCW BoM (downloaded from Cisco) in order to ensure that **all** the same items exist and that the quantities are identical and correct. This merge and comparison enables you to identify discrepancies and helps you fix them, and also enables you to merge the Disti VAR Cost into the BoM.

Import Format

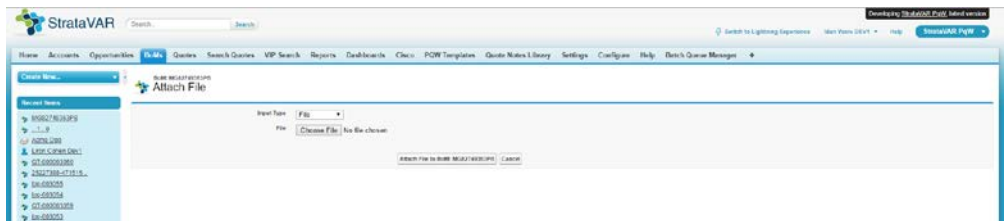
StrataVAR PQW is provided with the ability to parse various types of input formats, whether they are received electronically using an API or imported from an Excel file. These formats are listed on page 14.

► **To compare/merge a Disti quote with an existing BoM in StrataVAR PQW –**

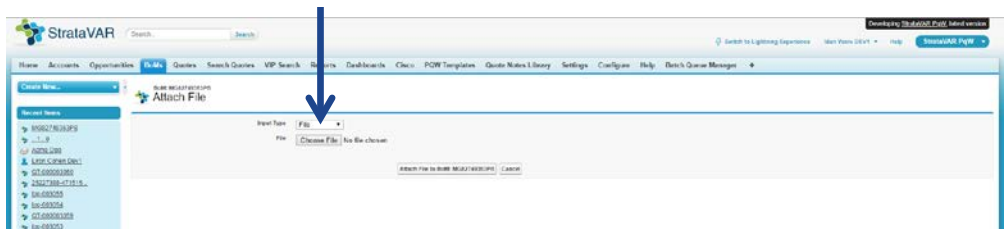
- 1 Import the Source BoM, which can be either a CCW Estimate or a CCW Quote.
- 2 Open the BoM Details page of this BoM, as described on page 41.



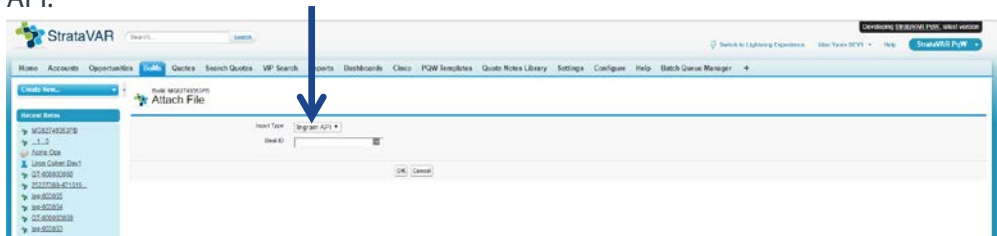
- 3 Click the **Attach Disti** button. The following displays –



- 4 If the source is an Excel file, click the **Choose File** button and select a **Disti Quote** Excel file.



If the source is an **Ingram API**, click the **Choose File** button and select an Ingram API.



5 Click the **Attach File to BoM** button. The following displays –

The screenshot shows the StrataVAR application interface displaying a comparison between Vendor BoM and Distri BoM. The interface includes a search bar, a sidebar with navigation links, and a main content area with a table comparing Vendor BoM and Distri BoM. The table has columns for Match, Ln #, Part Number, Description, Qty, Buy Method, Price, Price Set, List Price, Ext. List Price, Discount, and Ext. Price. The Vendor BoM is on the left and the Distri BoM is on the right. The table shows 10 rows of data, with the first row being a header row. The Vendor BoM total is 163,276.80 and the Distri BoM total is 117,983.00. The table also includes a 'Total' row at the bottom.

Match	Ln #	Part Number	Description	Qty	Buy Method	Price	Price Set	List Price	Ext. List Price	Discount	Ext. Price
OK	1	C1F1AASR1K9	Cisco ONE Foundation F	2	IngramMicro	17,500.00	35,000.00	59.00	14,350.00		14,350.00
?	2	1-1-1-0-CON-ECMU-CFPA82-SWSS UPGRADES C1	2-Tier	2	IngramMicro	2,625.00	5,250.00	32.00	3,570.00		3,570.00
OK	3	PVDM-64	64-channel DSP module	1	IngramMicro	3,400.00	3,400.00	59.00	1,394.00		1,394.00
OK	4	L-SP-LA-E-25-K9	LiveAction Ent Perpetual	1	IngramMicro	35,400.00	35,400.00	59.00	14,514.00		14,514.00
OK	5	ASA5515-FPW-K9	ASA 5515-X with FireP	4	IngramMicro	5,995.00	23,980.00	59.00	9,831.80		9,831.80
?	6	CON-SNTPASAS68	SMARTNET 24X7X4 AS	4	IngramMicro	1,150.00	4,600.00	32.00	3,128.00		3,128.00
OK	7	ASA5515-TM1C-1	Cisco ASA5515 FireP	4	IngramMicro	1,800.00	7,200.00	59.00	2,952.00		2,952.00
OK	8	FS-VMM-10-SW-K9	Cisco FireSIGHT Manag	1	IngramMicro	2,000.00	2,000.00	59.00	820.00		820.00
?	9	CON-SAU-VMM5W12W	APP SUPP + UPRG	1	IngramMicro	400.00	400.00	32.00	272.00		272.00
OK	10	ISR4431-K9	Cisco ISR 4431 4GE 3N	1	IngramMicro	11,000.00	22,000.00	59.00	4,510.00		4,510.00
Total:						139,230.00	60.25	55,341.80			

- **Original BoM (Left)** – The left side of this window shows the original BoM in PQW, as imported from CCW.
- **Disti Quote (Right)** – The right side of this window shows the quote received from the Disti.
- Only non-zero price items are shown, because the Disti does not provide them anyway.
- The **Match** column on the left indicates whether the Original BoM matches the Disti Quote.

OK – Indicates that they match. A symbol indicates a discrepancy to be handled by you, as follows –

- **#** – Quantity mismatch
- **\$** – Price mismatch
- **%** – Discount mismatch
- **?** – Missing items

- You can click the **View All** button to display all comparison rows or the **View Errors** button to only display discrepancy rows.
- The fields with a discrepancy are indicated in red, as shown below –

StrataVAR Search...

Home Accounts Opportunities BoMs Quotes Search Quotes VIP Search Reports Dashboards Settings Configure Help POW Templates Rebates Sales Orders (Vendor) +

View Errors View All Update Vendor BoM-All Update Vendor BoM-Prices Update Vendor Discount Only Export to Excel

Quote Merge: Vendor BoM: 15442510-4710735907 Distri BoM: IngramMicro 10788191-29639031

Vendor Total Extended Price: 183,276.80 Dist Total Extended Price: 58,867.80 Page 2 of 4

Match	Ln #	Part Number	Description	Qty	Buy Met	Price	Ext. Price	Dist. Price	Ext. Price
OK	11	ISR4431	SMARTNET 24X74 C	2	2-Tier	1,086.00	3,332.00	32.00	64.00
OK	12	ISR4431	AC Power Supply (Seco	2	IngramMicro	800.00	1,600.00	59.00	328.00
OK	13	ISR4431	Cisco ONE Foundation	2	2-Tier	5,000.00	10,000.00	39.00	6,160.00
OK	14	ISR4431	SWSS UPGRADES Cisc	2	2-Tier	750.00	1,500.00	32.00	1,020.00
OK	15	ISR4431	ONE ADVANCED APP	1	IngramMicro	3,000.00	3,000.00	58.00	1,236.00
OK	16	ISR4431	SWSS UPGRADES C1	1	2-Tier	450.00	450.00	32.00	306.00
OK	17	ISR4431	Cisco Identity Services E	2	2-Tier	25,990.00	25,990.00	39.00	15,854.00
OK	18	ISR4431	SW APP SUPP + UPGR	1	2-Tier	5,198.00	5,198.00	32.00	3,535.00
OK	19	ISR4431	Cisco Identity Services E	1	2-Tier	7,500.00	7,500.00	39.00	4,575.00
OK	20	ISR4431	Cisco ISE 3-yr 1500 E	1	2-Tier	22,400.00	22,400.00	39.00	13,864.00
			Total:			89,970.00	39.23	49,206.00	

- You can filter the rows of this table in the usual manner. For example, by specifying that only discrepancies with a specific type of mismatch are displayed, as shown below –

StrataVAR Search...

Home Accounts Opportunities BoMs Quotes Search Quotes

View Errors View All Update Vendor BoM-All Update Vendor BoM-Prices

Quote Merge

Vendor Total Extended Price: 163,276.80 Distri Total Extended Price:

Vendor BoM: 15442510-4

Match	Ln #	Part Number	Description	Qty	Buy Met
OK	11	ISR4431	SMARTNET 24X74 C	2	2-Tier
OK	12	ISR4431	AC Power Supply (Seco	2	IngramMicro
OK	13	ISR4431	Cisco ONE Foundation	2	2-Tier
OK	14	ISR4431	SWSS UPGRADES Cisc	2	2-Tier

6 According to how you evaluate the discrepancy, select the checkbox of the discrepancy records to be handled and then use one of the following three buttons. Each button merges some of the Disti quote values into the StrataVAR PQW BoM in a different manner –

- **Update Vendor BoM – All** – Merges all the columns of the selected items from the Disti into the StrataVAR PQW BoM, meaning that all the columns of these items in the StrataVAR PQW BoM are overwritten with the values from the Disti Quote.
- **Update Vendor BoM – Prices** – Only the prices of the items that are selected in the StrataVAR PQW BoM are overwritten into the StrataVAR PQW BoM.
- **Update Vendor Discount Only** – Only the discounts of the items that are selected in the StrataVAR PQW BoM are overwritten into the StrataVAR PQW BoM.

Export Excel

This option enables you to export a list of problematic items into an Excel file to be sent to a Disti for clarification and mitigation.

For example, the following shows a quantity mismatch. The Disti quote (on the left) shows the Qty **2** and the StrataVAR PQW BoM (on the right) shows the Qty **1**.

The screenshot shows the StrataVAR application interface with a comparison between Vendor BoM and Disti BoM for IngramMicro. The interface includes a search bar, navigation tabs, and a table with columns for Match, Ln #, Part Number, Description, Buy Method, Price Set, List Price, Ext. List Price, Discount, and Ext. Price. The table is divided into two sections: Vendor BoM (left) and Disti BoM (right). A quantity mismatch is highlighted in row 12, where the Vendor BoM shows a quantity of 2 and the Disti BoM shows a quantity of 1. Two blue arrows point to the quantity fields in the respective rows.

Match	Ln #	Part Number	Description	Buy Method	Price Set	List Price	Ext. List Price	Discount	Ext. Price
OK	11	NTPI-SR431 SMARTNET 24X7X4	2-Tier			1,868.00	3,332.00	32.00	2,266.00
OK	12	AC Power Supply (Seco	2-Tier			800.00	1,000.00	58.00	858.00
OK	13	SR4431SK3 Cisco ONE Foundation P	2-Tier			5,000.00	10,000.00	39.00	6,100.00
OK	14	3MLC1F1440 SWSS UPGRADES Csc	2-Tier			750.00	1,500.00	32.00	1,020.00
OK	15	C1AUAISR4400SK3 Cisco ONE Advanced A	1-Tier			3,000.00	3,000.00	58.00	1,230.00
OK	16	CON-ECMU-C1A440 SWSS UPGRADES C1	1-Tier			450.00	450.00	32.00	306.00
OK	17	ISE-5VM-K9	1-Tier			25,960.00	25,960.00	38.00	15,854.00
OK	18	CON-SAU-ISE5VM SW APP SUPP + UPRG	1-Tier			5,198.00	5,198.00	32.00	3,536.00
OK	19	ISE-5SE-1500	1-Tier			7,500.00	7,500.00	39.00	4,575.00
OK	20	ISE-PLS-3YR-1500	1-Tier			22,400.00	22,400.00	38.00	13,984.00
		Total:				80,970.00	39.23	49,206.00	

Click the **Export to Excel** button to export the items with a discrepancy into an Excel file to be sent to a Disti for clarification and mitigation. The following shows an example of such an Excel file –

Match	Ln #	Part Number	Description	Qty	Svc. Desc.	Buy Method	Price Source	List Price	Ext. List Price	Discount	Ext. Price	Ln #	Part Number	Description	Qty	Dist	List Price	Discount
5	5	PWR-443D-AC/2	AC Power Supply (Secoac	2.00		IngramMicro		800.00	1,600.00	59.00	856.00	0003	PWR-443D-AC/2	AC PWR SLP SECONDARY	1.00	IngramMicro	800.00	59.00
6	6	CF1A5R44315K9	Cisco ONE Foundation Per	2.00		2-Tier		5,000.00	10,000.00	39.00	6,100.00	0004	CF1A5R44315K9	ONE FOUNDATION PERPE	1.00	IngramMicro	5,000.00	39.00

3.3.3 Defining a BoM as Reusable

Specific BoMs may be marked as reusable, so that they can be used in any Account or Opportunity/Project. These BoMs can be imported into any Quote, regardless of the Account to which the Quote belongs.

► **To define a BoM as reusable –**

- 1 Import a source quote in order to create a BoM (as described in page 34).
- 2 Edit the BoM, as described on page 32.
- 3 Change the **Global Reusable** field to **Yes**. For more details, see page 72.

Global Reusable: Yes

3.4 Handling a Maintenance BoM

3.4.1 Overview

The import of both types of **Maintenance BoMs** (**CCW-R Quote** and **CCW-R Invoice**) differs from that of handling the other types of BoMs (that were described above).

BoM Type: Maintenance BoM

Source: CCW-R Quote

Import Into Existing Quote: --None--

Quote Aggregated By: None

Type: Quote Number Id

Quote ID: 367

A two-stage process was required for handling the other three types of BoMs (Cisco Estimate, Deal Registration and Distri BoM) –

- Stage I was to import the BoM into StrataVAR PQW.
- Stage II is to create a new Quote and then to assemble the items from the imported BoMs into a Quote (as described on page 57).

When you import a **Maintenance BoM**, both of these stages are performed at once. This means that after you import either type of Maintenance BoM (CCW-R Quote or CCW-R Invoice), **both the BoM and a Quote are created** – and all the items from the BoM are assembled into the Quote.

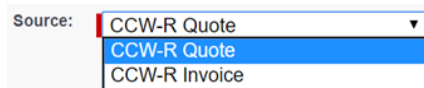
As a result, at the end of this batch process, two email notifications are sent –

- **StrataVAR PQW BoM Created** – An email indicating that the StrataVAR PQW BoM was created and containing a link to this BoM in StrataVAR PQW.
- **StrataVAR PQW Quote Created** – Another email indicating that the StrataVAR PQW Quote was created and containing a link to this Quote in StrataVAR PQW.

3.4.2 Defining a Maintenance BoM

► To define a maintenance BoM –

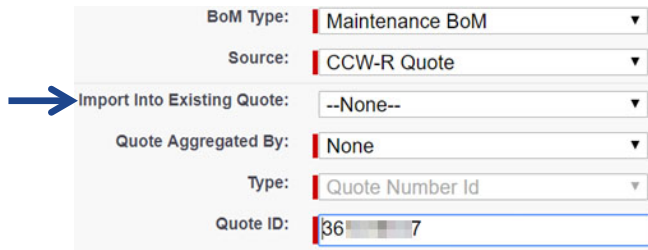
- In the **Source** field, shown on page 36, from the dropdown menu, select either **CCW-R Quote** or **CCW-R Invoice** –



The image shows a screenshot of a software interface. On the left, the word "Source:" is followed by a dropdown menu. The dropdown menu is open, showing two options: "CCW-R Quote" and "CCW-R Invoice". The "CCW-R Quote" option is currently selected and highlighted with a blue background. The dropdown menu has a small downward-pointing arrow on its right side.

- **CCW-R Quote** – This type of quote is typically a tier 1 Partner, which is also called a DVAR (Direct VAR).
- **CCW-R Invoice** – This type of quote is typically a tier 2 Partner.
- To import this BoM into a new Quote in StrataVAR PQW, in the **Import into Existing Quote** field, select the **–None–** option.

- Import Into Existing Quote** – This option enables you to import a CCW quote into a new or an existing StrataVAR PQW Quote, meaning that the items of the BoM are imported and are immediately all added to a new Quote in StrataVAR PQW or to the existing Quote that you select below. Note that the BoM is separate. Only the quotes are combined.



BoM Type: Maintenance BoM

Source: CCW-R Quote

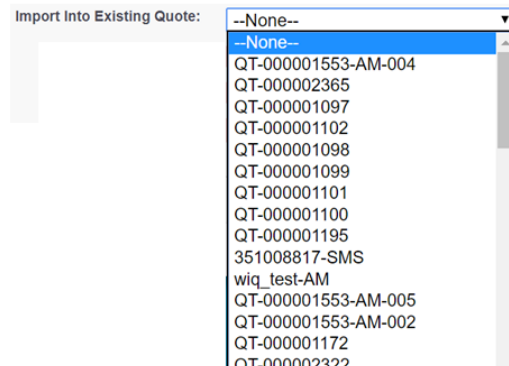
Import Into Existing Quote: --None--

Quote Aggregated By: None

Type: Quote Number Id

Quote ID: 367

To import this BoM into an existing Quote in StrataVAR PQW, in the **Import into Existing Quote** field, from the dropdown menu, select one of the listed existing Quotes in StrataVAR PQW.



Import Into Existing Quote: --None--

- None--
- QT-000001553-AM-004
- QT-000002365
- QT-000001097
- QT-000001102
- QT-000001098
- QT-000001099
- QT-000001101
- QT-000001100
- QT-000001195
- 351008817-SMS
- wiq_test-AM
- QT-000001553-AM-005
- QT-000001553-AM-002
- QT-000001172
- QT-000002322

Defining Quote Aggregation for a Maintenance BoM

The following applies to both a **CCW-R Quote** or **CCW-R Invoice Maintenance BoM**.

Maintenance BoMs generally contain large quantities of items. For this reason, StrataVAR PQW enables you to automatically aggregate the items of a Maintenance BoM that are imported into the StrataVAR PQW Quotes. For example, a Maintenance BoM may contain 10,000 items that are imported into a StrataVAR PQW Quote as a batch process, which can be aggregated in 10–20 customer Quote Items, based on the service level (for example, SNT, ECMU and so on).

The following options are provided for automatically aggregating the items into a StrataVAR PQW Quote. These options automatically generate Quote rows showing an aggregation of the items from the BoM. Examples are provided on the following pages.

Select one of the following options in the **Quote Aggregated By** field –

- **None** – No automatic aggregation is performed. This means that the import of 10,000 BoM items results in 10,000 items in the StrataVAR PQW Quote.
- **All** – The entire BoM is imported as a single Quote item. This means that the import of 10,000 BoM items results in a single item in the StrataVAR PQW Quote –
 - **Custom** – Selecting this option displays the **Quote Aggregated Fields** field under the **Quote Aggregated By** field, as shown below. This new field enables you to define up to four properties by which the items are aggregated.

Each of the four dropdown menus, from left to right, enables you to specify a property of the item by which to aggregate them. The leftmost dropdown specifies the top-level aggregation, the next one to its right is a sub-aggregation of it and so on.

Example 1 – Aggregation by Company, Product Type and Product Model

For example, items can be aggregated by user service level and within each service level by product type and within each product type by product model. This means that the Quote will show a summary line per service level, plus a summary line for each product type, a summary line for each product model and a line for each item of that product model.

Example 2 – Aggregation by Service Level

The following table shows an example of four items in a BoM and then explains how they would be aggregated for each option that you might select in the **Quote Aggregated By** field.

P/N	Description	Service Level	Takeover	Price
111	Router A	SNT	Yes	10
222	Router B	SNT	Yes	30
333	Router C	SNT	No	70
444	Router D	EMC	Yes	80
555	Router E	EMC	No	40
666	Router F	EMC	No	20

- If **None** was selected in the **Quote Aggregated By** field, then the Quote will contain six items – with the prices **10, 30, 70, 80, 40** and **20**.
- If **All** was selected in the **Quote Aggregated By** field, then the Quote will contain a single item with the price **250**.
- If **Custom** was selected in the **Quote Aggregated By** field and the property **Service Level & Takeover** was selected in the **Quote Aggregate Fields** field, then the Quote would contain four items – **SNT:YES, SNT:NO, EMC: YES, EMC:NO**– with the prices **40, 70, 80** and **60**.
- **Show Advanced Settings** – Click this option to show advanced settings that enable you to define how various items in the Quote appear, as follows –

[Hide Advanced Settings](#)

Grouping:	Source Service Level	--None--	Site Country
Part Number Presentation:	Show – no label	Show – no label	Show – no label
Description Presentation:	Show – no label	Show – no label	Show – no label

- **Grouping** – The **Quote Aggregated by** field (described above) enables you to define how items are automatically grouped in the Quote. The **Grouping** option enables you to specify for each aggregation breakdown (meaning each of the four dropdown fields described above) whether the associated summary items appear with a label or not.

- **Show with Label** – The summary item shows the common denominator label and value of the items being summarized. For example, the two **Service Level** summary items would appear – one showing **Service Level: SNT** and the other showing **Service Level: EMC**.
- **Show No Label** – The summary item shows the common denominator value of the items being summarized without a label. For example, the two **Service Level** summary items would appear – one showing **SNT** and the other showing **EMC**.
- **Do Not Display** – The summary item appears, but does not show the label or the value of the common denominator of the items being summarized. For example, the two **Service Level** summary items would appear without either the word service level or the value **SNT** or **EMC**.

Grouping:	Source Service Level	--None--	--None--
Part Number Presentation:	Show with label	Show – no label	Show – no label
Description Presentation:	Show with label	Show – no label	Show – no label

- **Part Number Presentation** – Defines how the part number is shown in the Quote. This field is optional. Select one of the following values, which work similarly to those described for the **Grouping** option on page 53 –
 - **Show with Label**
 - **Show No Label**
 - **Do Not Display**
- **Description Presentation** – Defines how the description is shown in the Quote. This field is optional. Select one of the following values, which work similarly to those described for the **Grouping** option on page 53 –
 - **Show with Label**
 - **Show No Label**
 - **Do Not Display**

StrataVAR

Home Accounts Opportunities **Bills** **Quotes** Search Quotes VIP Search Reports Dashboards Clio FGR Templates Quote Notes Library Settings Configure Help Batch Quote Manager

Select Quotes Copy Bulk Items **Edit** **Save** **Save** **Go to Quote** **Export Quote**

Total List Price: \$33,115.64 Customer Total Price: \$33,115.64 Customer Discount: 0.00 (0.00%)
 With Total Cost: \$40,424.61 With Total Profit: \$22,860.23 With Net: \$3,990.23 (12.06.00%) Total Profit = WIP: 32,869.23 (96.36%)
 Selected Quote Items: 0 Quote Item Detail Click to view Quote Item Detail Click to view

Printed a values + Set to 0 + Enter a value update selected items

Quote: 017-000000017 - ALUMINUM CLIP - ALUMINUM CLIP - ALUMINUM CLIP

Item	Name	Part Number	Description	Unit Price	Qty	Total Price	Unit Cost	Total Cost	Unit Margin	Total Profit	Cost Price	Cost Price	Item Type	Units	Location
017-000000017	ALUMINUM CLIP	017-000000017	ALUMINUM CLIP	1.00	1	1.00	0.00	0.00	1.00	1.00	0.00	0.00	Other	1	
017-000000017	ALUMINUM CLIP	017-000000017	ALUMINUM CLIP	1.00	1	1.00	0.00	0.00	1.00	1.00	0.00	0.00	Other	1	
017-000000017	ALUMINUM CLIP	017-000000017	ALUMINUM CLIP	1.00	1	1.00	0.00	0.00	1.00	1.00	0.00	0.00	Other	1	
017-000000017	ALUMINUM CLIP	017-000000017	ALUMINUM CLIP	1.00	1	1.00	0.00	0.00	1.00	1.00	0.00	0.00	Other	1	
017-000000017	ALUMINUM CLIP	017-000000017	ALUMINUM CLIP	1.00	1	1.00	0.00	0.00	1.00	1.00	0.00	0.00	Other	1	
017-000000017	ALUMINUM CLIP	017-000000017	ALUMINUM CLIP	1.00	1	1.00	0.00	0.00	1.00	1.00	0.00	0.00	Other	1	
017-000000017	ALUMINUM CLIP	017-000000017	ALUMINUM CLIP	1.00	1	1.00	0.00	0.00	1.00	1.00	0.00	0.00	Other	1	
017-000000017	ALUMINUM CLIP	017-000000017	ALUMINUM CLIP	1.00	1	1.00	0.00	0.00	1.00	1.00	0.00	0.00	Other	1	
017-000000017	ALUMINUM CLIP	017-000000017	ALUMINUM CLIP	1.00	1	1.00	0.00	0.00	1.00	1.00	0.00	0.00	Other	1	
017-000000017	ALUMINUM CLIP	017-000000017	ALUMINUM CLIP	1.00	1	1.00	0.00	0.00	1.00	1.00	0.00	0.00	Other	1	
017-000000017	ALUMINUM CLIP	017-000000017	ALUMINUM CLIP	1.00	1	1.00	0.00	0.00	1.00	1.00	0.00	0.00	Other	1	
017-000000017	ALUMINUM CLIP	017-000000017	ALUMINUM CLIP	1.00	1	1.00	0.00	0.00	1.00	1.00	0.00	0.00	Other	1	
017-000000017	ALUMINUM CLIP	017-000000017	ALUMINUM CLIP	1.00	1	1.00	0.00	0.00	1.00	1.00	0.00	0.00	Other	1	
017-000000017	ALUMINUM CLIP	017-000000017	ALUMINUM CLIP	1.00	1	1.00	0.00	0.00	1.00	1.00	0.00	0.00	Other	1	
017-000000017	ALUMINUM CLIP	017-000000017	ALUMINUM CLIP	1.00	1	1.00	0.00	0.00	1.00	1.00	0.00	0.00	Other	1	
017-000000017	ALUMINUM CLIP	017-000000017	ALUMINUM CLIP	1.00	1	1.00	0.00	0.00	1.00	1.00	0.00	0.00	Other	1	
017-000000017	ALUMINUM CLIP	017-000000017	ALUMINUM CLIP	1.00	1	1.00	0.00	0.00	1.00	1.00	0.00	0.00	Other	1	
017-000000017	ALUMINUM CLIP	017-000000017	ALUMINUM CLIP	1.00	1	1.00	0.00	0.00	1.00	1.00	0.00	0.00	Other	1	
017-000000017	ALUMINUM CLIP	017-000000017	ALUMINUM CLIP	1.00	1	1.00	0.00	0.00	1.00	1.00	0.00	0.00	Other	1	
017-000000017	ALUMINUM CLIP	017-000000017	ALUMINUM CLIP	1.00	1	1.00	0.00	0.00	1.00	1.00	0.00	0.00	Other	1	
017-000000017	ALUMINUM CLIP	017-000000017	ALUMINUM CLIP	1.00	1	1.00									

[illegible]

- ### 3.4.3 CCW-R Invoice

StrataVAR PQW User Guide V1.0

The result of importing a **CCW-R Quote** is a single StrataVAR PQW BoM and a single PQW Quote. Importing a **CCW-R Invoice** differs in that two types of StrataVAR PQW BoMs are generated and two types of Quotes – **SMS** and **Detailed**. The SMS-type quotes have a small number of lines as determined by the Cisco SMS section of the CCW-R Quote. Detailed-type quotes are predefined by the system and cannot be changed during the import process. However, they can be edited, if needed, thereafter. For example, if a CCW-R Invoice number 12345 is imported, then the following is generated –

- BoM 12345-SMS
- BoM 12345-Detailed
- Quote 12345-SMS
- Quote 12345-Detailed

Tip – If you want to use the same CCW-R Quote in different StrataVAR Quotes, then you only need to import it once and then use it in each StrataVAR quote.

For example, as shown below –

Description

Custom Links

Delivery Status

Edit

Delete

Clone

Import BoM

Create New Quote

BoMs

BoMs Help ?

Action	BoM Number	Record Type	BoM Name	Total Extended List Price	Total Discount	Discount Status	Total Extended Net Price	VIP Payout	Deal Status	Last Modified Date
Edit | Del	281147147-SMS	Maintenance BoM	281147147-BCBS Serial Lookup 1yr SNT	0.00	0.00		0.00		Valid	5/14/2018
Edit | Del	221023292	Maintenance BoM	221023292-Ball 1YR	0.00	0.00		0.00		Valid	5/4/2018
Edit | Del	221023292-Detailed	Maintenance BoM	221023292-Ball 1YR	399,817.61	15.00		339,844.79		Valid	2/24/2018
Edit | Del	221023292-SMS	Maintenance BoM	221023292-Ball 1YR	399,116.21	15.00		339,248.60		Valid	2/24/2018
Edit | Del	9845653	Maintenance BoM	9845653-EI Paso County	611,817.02	23.00		471,099.18		VALID	9/18/2017

Show 2 more » | [Go to list \(7\) »](#)

Quotes

Quotes Help ?

Action	Quote Number	Quote Version	Quote Name	Total Extended List Price	VAR Total Cost	VAR Discount	VAR Total Profit	Total Customer Extended Price	Customer Discount	Active
Edit | Del	QT-000002501	1	MG Maint Tests	\$63,584.16	\$39,425.61	37.99	\$24,158.55	\$63,584.16	0.00	
Edit | Del	QT-000002496	1	MG Maint Tests	\$63,584.16	\$39,425.61	37.99	\$24,158.55	\$63,584.16	0.00	
Edit | Del	QT-000002495	1	MG Maint Tests	\$63,584.16	\$39,425.61	37.99	\$24,158.55	\$63,584.16	0.00	
Edit | Del	QT-000002487	1	MG Maint Tests	\$63,584.16	\$39,425.61	37.99	\$24,158.55	\$63,584.16	0.00	
Edit | Del	QT-000002409	1	MG Maint Tests	\$0.00	\$0.00	0.00	\$0.00	\$0.00	0.00	

Show 5 more » | [Go to list \(15\) »](#)

Open Activities

New Task

New Event

Open Activities Help ?

No records to display

Activity History

Log a Call

Mail Merge

Send an Email

Activity History Help ?

No records to display



Assembling a Quote

This chapter describes how to collect and group the items of imported BoMs to be included in a StrataVAR PQW Quote.

4.1 Assembling – Introduction

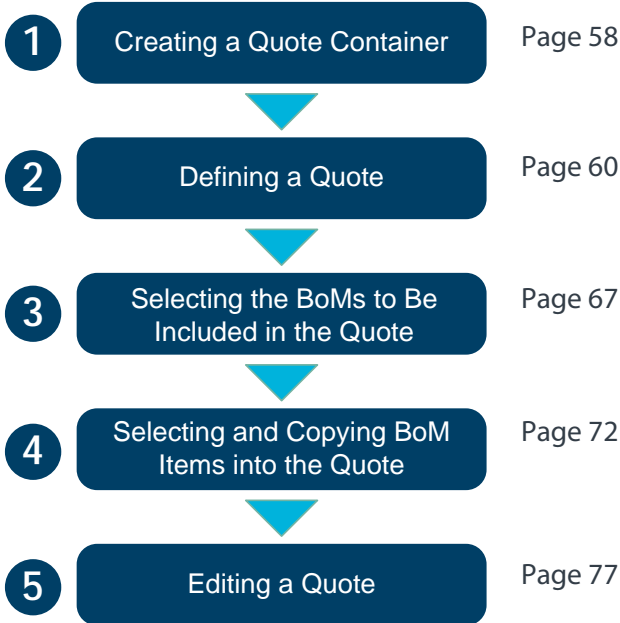
As the first step of using StrataVAR PQW to generate customer-facing PQW Quotes, we imported source data from suppliers into PQW and created BoMs, as described in *Chapter 3, Importing Sources – Creating BoMs* on page 31.

In this stage, you select and group the items of the imported BoMs to be included in a PQW Quote. A PQW Quote places the full power of StrataVAR PQW's sophisticated pricing functionality at your fingertips.

At this stage, the Quote in PQW is where you place items (collected from BoMs) that you may want to include in the final exported Customer-facing Quote that will be created in *Chapter 6, Exporting a Quote* on page 93. Each Quote is intended for creating a different Quote for a different customer.

Each PQW Quote belongs to a specific Opportunity or Project. You can create multiple versions of each Quote or create different sibling Quotes.

4.2 Assembling – Workflow



4.3 Creating a Quote Container

A PQW Quote is the container that will hold the items and pricing information that will later be exported as a customer-facing Quote.

A new Quote can be created from either the **Opportunities/Projects** tab or from the **BoM Details** tab, as described below.

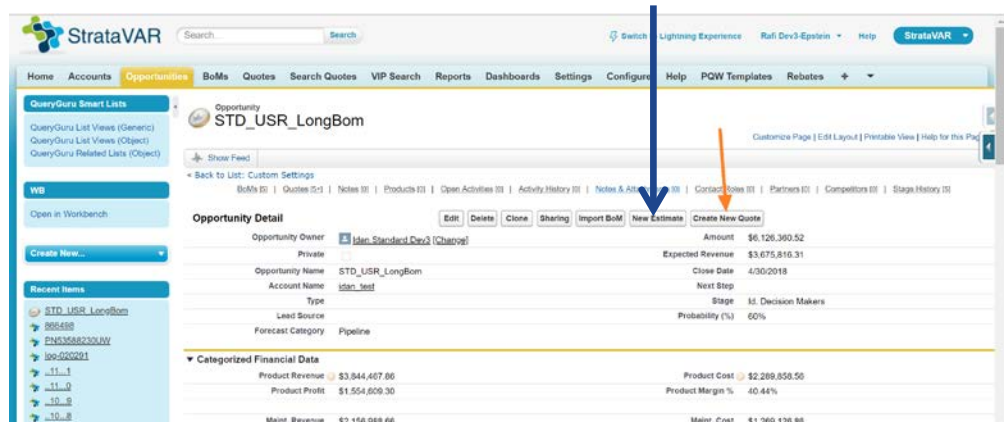
► **To create a Quote from the Opportunities/Projects tab –**

- 1 To display an Opportunity, click the **Opportunities** tab at the top of the window, and then click an Opportunity to display the **Opportunity Details** tab.

–OR–

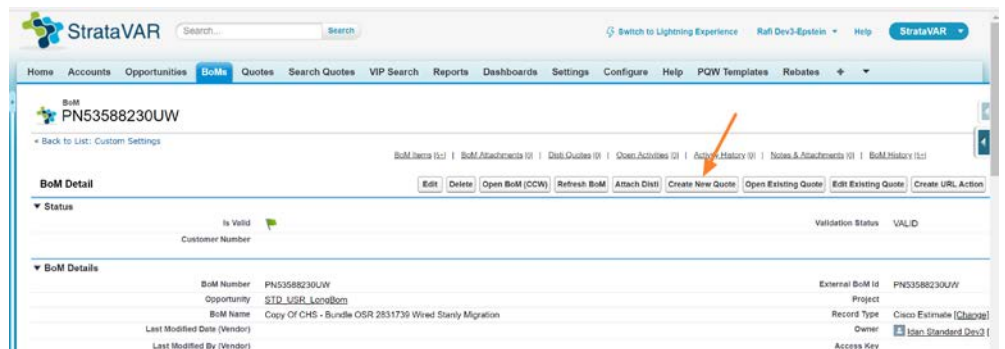
To display a Project, click the **Project** tab at the top of the window, and then click a Project to display the **Project Details** tab.

- 2 To create a new Quote from the **Opportunities/Projects** tab, click the **Create New Quote** button, shown below –



– OR –

From the **BoMs** tab, click the **Create New Quote** button.



4.4 Defining a Quote

The following describes how to define the metadata of a Quote.

You can customize the layout to specify which fields are displayed and their location on the page.

The data that you enter here can be exported into the customer-facing Quote or not, according to the StrataVAR PQW template that you select, as described in page 93. Therefore, you can use some of these fields for internal management/information purposes, because they are not defined to be exported into the customer-facing Quote.

After clicking the **Create New Quote** button (as described in the previous step), the following is displayed –

Note – The fields that display may vary from those shown below, depending on customization.

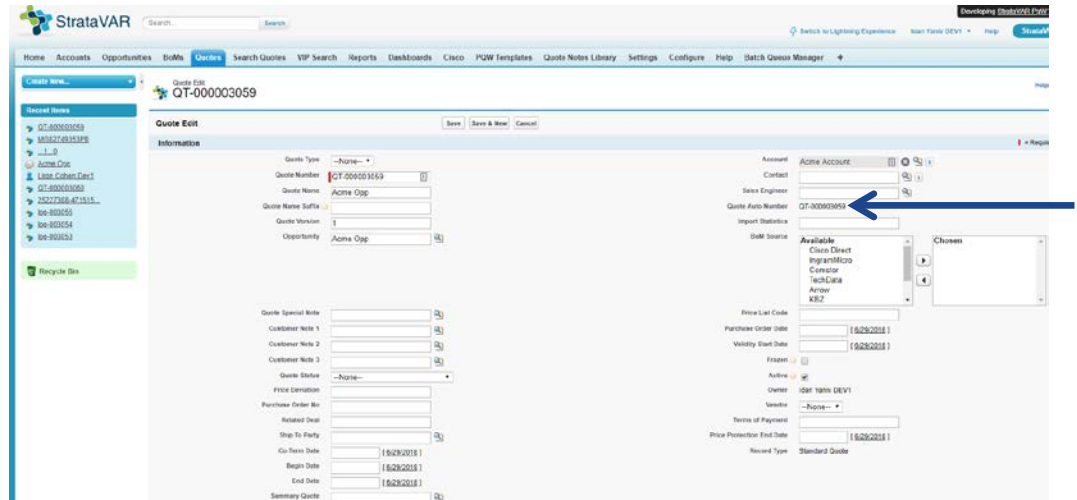
The screenshot shows the 'StrataVAR' application interface for creating a new quote. The top navigation bar includes links for Home, Accounts, Opportunities, Buys, Quotes, Search Quotes, VIP Search, Reports, Dashboards, Clio, PQW Templates, Quote Notes Library, Settings, Configure, Help, and Batch Quote Manager. The main content area is titled 'Quote Edit' and contains a 'Quote Information' section. This section includes fields for Quote Type (Acme), Quote Number (QT-000003059), Quote Name (Acme Corp), Quote Name Suffix (Acme Corp), Quote Version (1), Opportunity (Acme Corp), Quote Service Rate (1.00000000), Customer Rate 1 (1.00000000), Customer Rate 2 (1.00000000), Customer Rate 3 (1.00000000), Quote Version (1), Price Deviation (0.00000000), Purchase Order No. (1.00000000), Shipment Date (1/20/2018), Ship To Party (1.00000000), Co-Term Date (1/20/2018), Begin Date (1/20/2018), End Date (1/20/2018), and Summary Quote (1.00000000). On the right side, there are additional fields for Account (Acme Account), Contact (Acme Corp), Sales Engineer (Acme Corp), Quote Auto Number (QT-000003059), Import Instance (1.00000000), Build Source (1.00000000), Price List Code (1.00000000), Purchase Order Date (1/20/2018), Validity Start Date (1/20/2018), Proven (checked), Active (checked), Order (Acme Corp), Vendor (Acme Corp), Terms of Payment (1.00000000), Price Protection End Date (1/20/2018), and Record Type (Standard Quote). A 'Recycle Bin' button is visible on the left side of the interface.

Fill in the displayed fields (as described below) and then click the **Save** button.

The following describes the most important (nontrivial) fields in this window –

Quote Number

StrataVAR PQW automatically assigns each new Quote with a unique identifier that cannot be changed. This value appears in the middle right of the window in the **Quote Auto Number** field, as shown below –

The screenshot shows the 'Quote Edit' window in the StrataVAR application. The 'Quote Number' field is highlighted with a blue arrow, showing the value 'QT-000003059'. The 'Quote Auto Number' field is also visible, showing the value 'QT-000003059'. The window includes a sidebar with 'Recent Items' and a main form area with various fields for quote information.

This **Quote Number** field enables you to assign your own free-text identifier for this Quote. It does not need to be unique. The default value of this field is the automatically assigned unique identifier of the **Quote Auto Number** field. It is recommended to keep the original value in this field, and to add more data as needed.

Quote Name

This free-text field gets its default value from the name of the Opportunity or Project.

Quote Name Suffix

This free-text field is appended as a suffix to the end of the Quote name. This can be used to differentiate between various alternatives of the same Quote.

Note – Remember that this field (and other metadata fields that you defined here) can be used for internal information purposes or can be included in the export to the customer-facing Quote (according to the definitions in the StrataVAR PQW template, as described in page 93).

Quote Version

This field specifies the version number of this Quote. It is automatically incremented by StrataVAR PQW. However, you have the option to modify it.

Opportunity

This field specifies the Opportunity to which this Quote belongs.

Please note the following –

- An Opportunity/Project belongs to an Account.
- A Quote belongs to an Opportunity/Project and an Account.
- A Quote can belong to a different Opportunity than the one to which it belongs, but that Opportunity must belong to the same Account as the Quote.
- Therefore, if you change the Opportunity of a Quote, then you may have to change the Account of that Quote also.

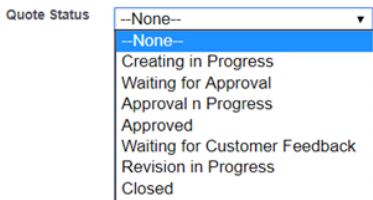
Quote Special Note and Customer Note 1, 2, 3

These fields enable you to include various types of additional information for yourself or to be included in the exported customer-facing Quote according to the StrataVAR PQW template that you select, as described on page 93.

StrataVAR PQW provides a library of notes, as described on page 64.

Quote Status

StrataVAR PQW provides a predefined list of statuses. You can assign any status to Quote at any time in order to help you manage its status.




Note – The system does not automatically implement any special functionality based on this fixed list of statuses.

Related Deal

This field enables you to enter a special CCW deal registration number, if one was not imported from a Deal.

Ship to Party

This lookup field  enables you to select the destination to which to ship the items of this Quote.


Account

This field specifies the Account to which this Quote belongs.


Please note the following –

- A Quote belongs to an Opportunity and an Account.
- An Opportunity belongs to an Account.
- A Quote can only belong to an Opportunity/Project that belongs to the same Account as the Quote.
- Therefore, if you change the Account of a Quote, then you most probably have to change the Opportunity of that Quote also.

Contact

This lookup field  enables you to select the person (contact) to whom to send this Quote.

Sales Engineer

This lookup field  enables you to select a person (contact) to be the technical sales engineer of this Quote.

Click the **Save** button. The Quote details are then displayed, as shown below –

The screenshot shows the 'Quote Detail' page for quote QT-000003059. The left sidebar contains a 'Recent Items' list with quotes like QT-000003059, M062749353PB, and others. The main area displays various fields for the quote, including Quote Type, Quote Number, Quote Name, Quote Name Suffix, Quote Version, Opportunity, Quote Special Note, Customer Note 1, 2, and 3, Quote Status, Price Deviation, Purchase Order No, Related Deal, Ship To Party, Co-Term Date, Begin Date, End Date, Summary Quote, Associated Quote, and Total Quote Line Items (143). On the right, there are tabs for Quote Items, Quote Attachments, Quote Activities, Activity History, Notes & Attachments, and Quote History. Below these tabs are buttons for Edit, Delete, Sharing, Create WQ, Copy BoM to Quote, Edit Quote, Export Quote, Summary Quote, and Import Sales Order. Further right, there are fields for Account (Acme Account), Contact, Sales Engineer, Quote Auto Number (QT-000003059), Import Statistics, Bill Source, Price List Code, Purchase Order Date, Validity Start Date, Frozen status, Active status (checked), Owner (Idan Yosef Dev1), Vendor, Terms of Payment, Price Protection End Date, Record Type (Standard Quote), and a 'Change' link.

To see a list of all the Quote items, scroll down to the **Quote Items** related lists, as shown below –

Quote Items										Quote Items Help
Action	Quote Item Name	Part Number	Quantity	Total List Price	VAR Total Cost	VAR Discount %	Cost Extended Price	Cost Discount %	Item Payoff Rebate	
Edit | Del	QT-000003059	CP-8885-K9	20	\$15,900.00	\$9,699.00	39.00	\$15,900.00	0.00	\$775.00	
Edit | Del	QT-000003059	CON-SNT-CP8885KP	20	\$500.00	\$340.00	32.00	\$500.00	0.00		
Edit | Del	QT-000003059	UCSB-S3260	1	\$23,999.00	\$12,809.39	39.00	\$20,999.00	0.00	\$384.00	
Edit | Del	QT-000003059	CON-SNT-UCSB3260	1	\$1,553.00	\$1,056.04	32.00	\$1,553.00	0.00		
Edit | Del	QT-000003059	CIMC-LATEST	1	\$0.00	\$0.00	0.00	\$0.00	0.00		

4.4.1 Quote Notes Library

The **Quote Note Library** tab enables you to define a library of reusable notes that can be embedded in StrataVAR PQW Quotes, BoMs and so on.

The screenshot shows the 'Quote Notes Library' page. The left sidebar contains a 'Recent Items' list with quotes like QT-000002928, InetEng No IE Professional Services, and idan_test. The main area displays the 'Quote Notes Library' with a 'Home' button and a 'View' dropdown set to 'All'. Below this is a table titled 'Recent Quote Notes Library' with columns for Notes Name, Description, Active, and Last Modified By. The table contains one entry: 'InetEng No IE Professional Services' with the description 'Use when there are no IE PS in the quote', which is active (checked) and was last modified by 'Rafiq4 Dev1.Eoslen' on 1/19/2017 12:25.


The Quote Notes Library enables you to –

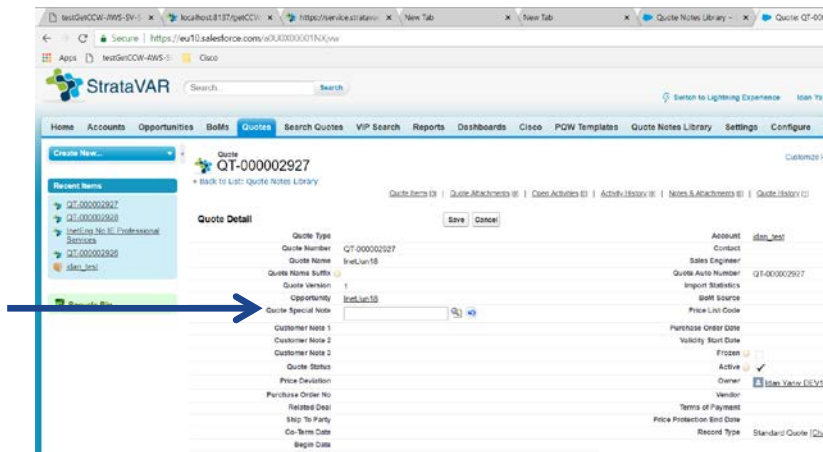
- Maintain consistency among users and quotes.
- Store structured text in the PQW database, making it more manageable and auditable.

The PQW Administrator predefines as many Quote Notes as necessary with meaningful names that can readily be looked up and selected by the user when necessary.

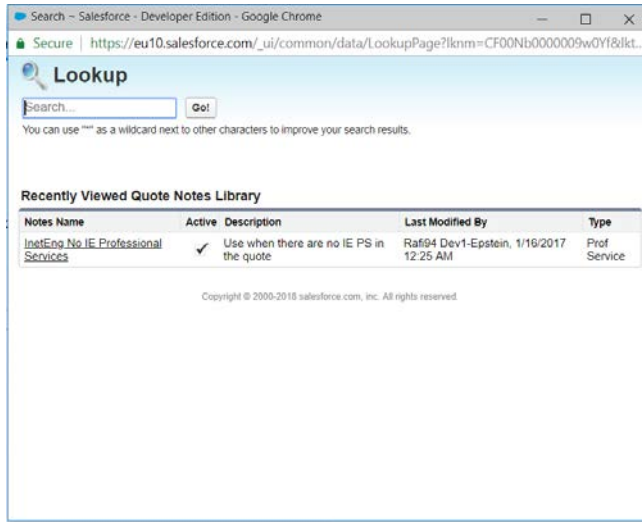
Quote Templates should be defined with the correct codes to embed the specific Quote Note(s). The Quote Note is then copied to Excel and saved with the Excel Quote in PQW. If the Quote Note is updated at a later point in time, it is not reflected in the saved Excel Quote.

► **To add a note to a Quote –**

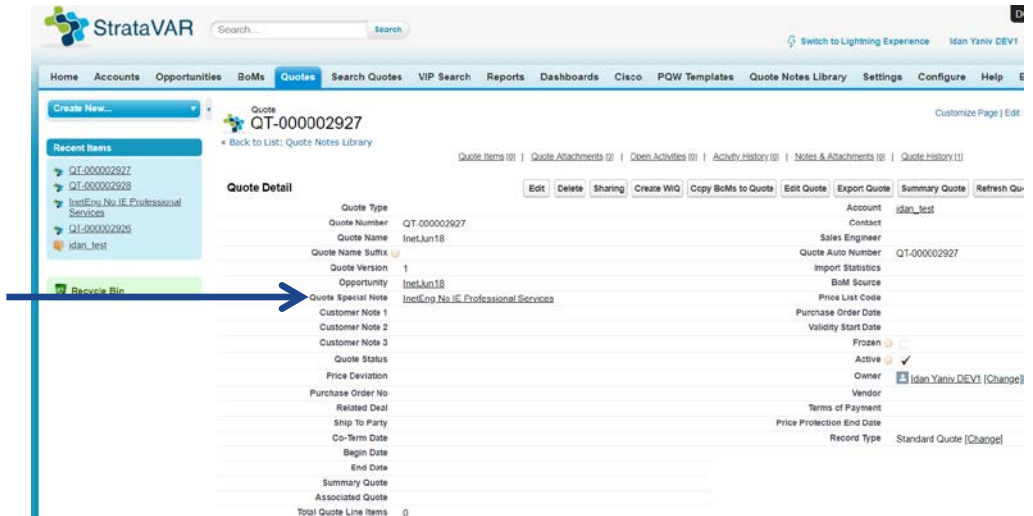
- 1 In the **Quote Special Note** field, click the **Search**  button to search for the note you want to add to the Quote.



The following displays –



- 2 Click the row of the note to be added to the Quote. The note is added to the Quote and displays as a link in the **Quote Special Note** field, as shown below –



4.5 Selecting the BoMs to Be Included in the Quote

The screenshot shows the 'Select BoMs' interface. At the top, there are tabs: 'Select BoMs' (active), 'Copy BoM Items', 'Edit', 'Summarize', 'Go to Quote', and 'Export Quote'. Below the tabs, a status bar indicates 'Selected BoMs: 1', 'BoM items selected: 57 (24 priced)', and 'BoM Source: Account BoMs (Sentinel Customer 1)'. A dropdown menu is open, showing options: 'Opportunity BoMs (Sent Test)', 'Account BoMs (Sentinel Customer 1)' (highlighted), 'Reusable BoMs', and 'Reusable and Opportunity BoMs (Sent Test)'. Below the dropdown is a table with columns: 'Name', 'Status', 'Record Type ID', 'Opportunity Name', 'Total Ext Net Price', 'Total Ext List Price', and 'Source'. The table contains five rows of data, all with 'Maintenance BoM' as the Record Type ID and 'Test CSCC Quote2BoM' as the Opportunity Name.

	Name	Status	Record Type ID	Opportunity Name	Total Ext Net Price	Total Ext List Price	Source
1			Maintenance BoM	Test CSCC Quote2BoM	868.40	1,336.00	Cisco
2			Maintenance BoM	Test CSCC Quote2BoM	695,686.90	873,093.37	CCWF
3			Maintenance BoM	Test CSCC Quote2BoM	54,001.36	81,763.17	Cisco
4			Maintenance BoM	Test CSCC Quote2BoM	1,367.60	2,104.00	Cisco
5			Maintenance BoM	Test CSCC Quote2BoM	35,800.66	49,478.21	Cisco

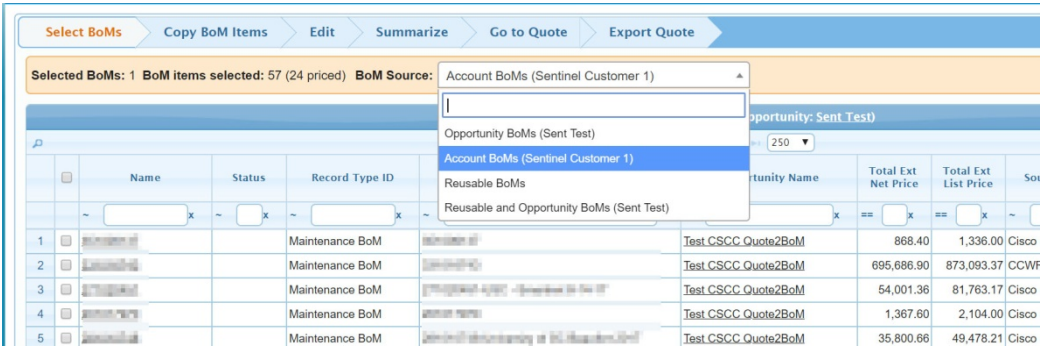
After you have imported BoM data from multiple sources (as described on page 31) and you have created and defined a Quote (as described starting on page 58), you must select the BoMs (as described below). These are the BoMs that contain items that you will later select to be included in the Quote (in the next step on page 72) –

- Any BoM under the same parent **Opportunity** or **Project** can be selected.
- BoMs in a different **Opportunity** or **Project** that have the same Account can also be selected.
- Reusable Quotes can be selected. A reusable BoM is visible globally, even though it belongs to a specific Account. These BoMs can be imported into any Quote, regardless of the Account to which it belongs. You may refer to page 33 for more information.

If the Quote will include items from multiple BoMs, it is up to you whether to –

- First select one BoM to be included in the Quote and then select its items, and then to do the same for the second and the third and so on.
– OR –
- First select all the BoMs to be included in the Quote and then select the items from each BoM to be included in the Quote.

4.5.1 Options for Selecting BOMs



The following options are provided in the dropdown menu shown above –

- **Opportunity BoMs** – Lists all the BoMs under the Opportunities/Projects that are in the same Account as the Quote. This enables you to select from any of the BoMs that belong to the same opportunity.
- **Account BoMs** – Selecting this option lists the BoMs that belong to the same Account as the Quote, which of course means all the BoMs that belong to the same Account as the Quote.
- **Reusable BoMs** – Specific BoMs that are defined as reusable (as described on page 33), meaning that they need not belong to a specific Account. These BoMs can be imported into any Quote, regardless of the Account to which the Quote belongs.
- **Reusable and Opportunity** – Lists both types of BoMs under the Opportunities/Project, as described above.

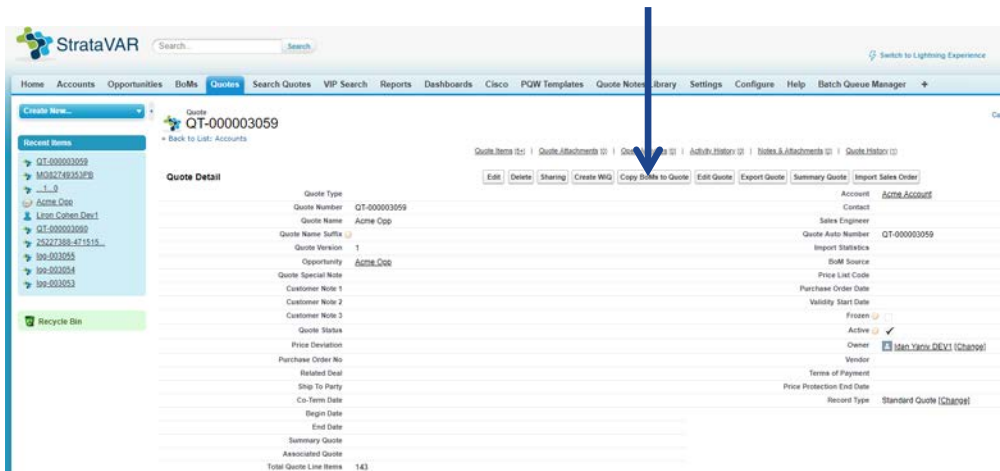
The following describes how to select a single BoM and then the items to be included in the Quote.

4.5.2 Listing the BoMs for Selection

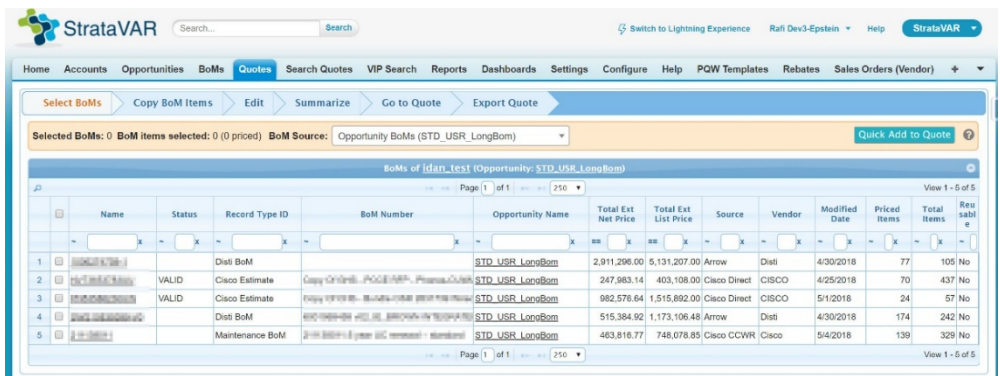
The following describes how to filter the list of BoMs to only show those that contain items that you would like to use for your Quote (which will be done in the next step on page 71).

► **To list the BoMs for selection –**

- 1 In the **Quote Details** page (shown on page 64), click the **Copy BoMs to Quote** button.



The following displays showing a list of BoMs –

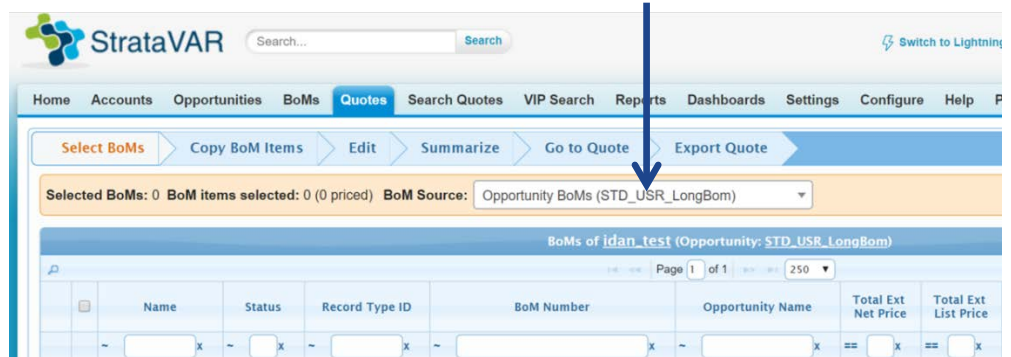


The top of this window lists the sequence of stages to be performed in order to generate a customer-facing Quote, as follows –

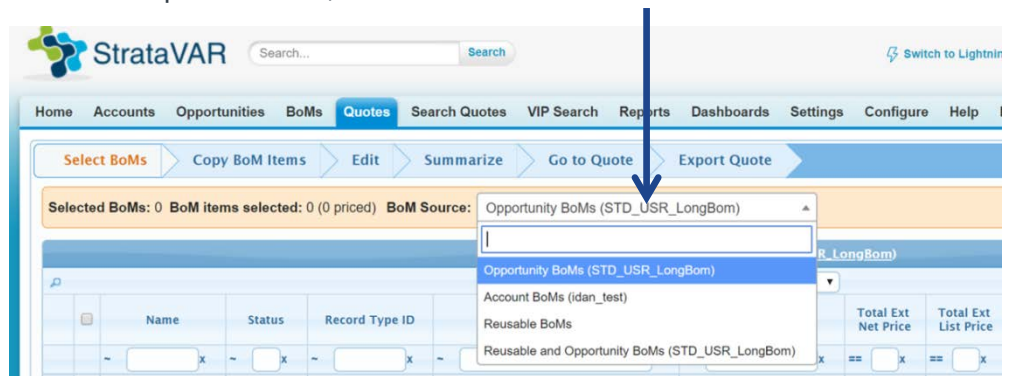


In general, these stages are to be performed from left to right; however, some are optional and you can repeat others. For example, if you already have a Quote open, you can go back and copy another BoM and its items to the Quote.

- 2 By default, this window lists all the BoMs under the **Opportunity/Project** to which this BoM belongs. This Opportunity is shown in the blue bar at the top middle of the window.



Select the **Opportunity/Project** that contains the relevant BoMs and Quotes from the dropdown menu, as shown below –



Filtering the BOMs List

You can use the filter fields at the top of this window to narrow down the list of displayed BoMs.

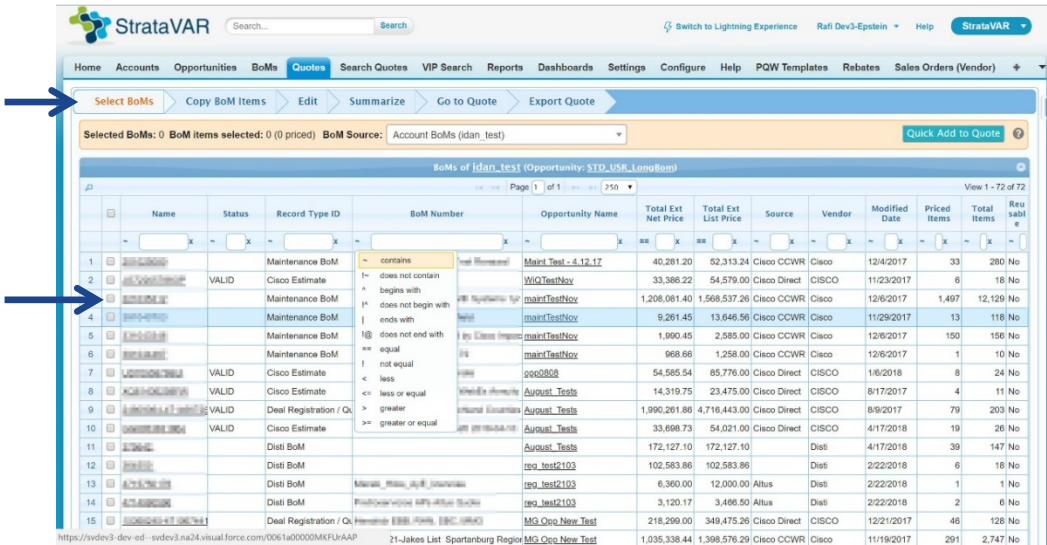


4.5.3 Selecting the BoMs to Be Included in the Quote

The following describes how to select the BoMs that contain items that you would like to use for your Quote (which will be done in the next step on page 72).

► **To select the BoMs to be included in the Quote –**

- From the displayed list of BoMs, make sure that the **Select BoMs** tab is selected, and then check the checkbox of the BoM(s) to be included in the Quote.



StrataVAR Search...

Switch to Lightning Experience Rafi Dev3-Epstein Help StrataVAR

Home Accounts Opportunities BoMs Quotes Search Quotes VIP Search Reports Dashboards Settings Configure Help PQW Templates Rebates Sales Orders (Vendor)

Select BoMs Copy BoM Items Edit Summarize Go to Quote Export Quote

Selected BoMs: 0 BoM items selected: 0 (0 priced) BoM Source: Account BoMs (idan_test) Quick Add to Quote

	Name	Status	Record Type ID	BoM Number	Opportunity Name	Total Ext Net Price	Total Ext List Price	Source	Vendor	Modified Date	Priced Items	Total Items	Reusable
1	...		Maintenance BoM	...	Maint Test - 4.12.17	40,281.20	52,313.24	Cisco CCWR	Cisco	12/4/2017	33	280	No
2	...	VALID	Cisco Estimate	...	WIOTestNov	33,386.22	54,579.00	Cisco Direct	CISCO	11/23/2017	6	18	No
3	...		Maintenance BoM	...	MaintTestNov	1,208,081.40	1,568,537.26	Cisco CCWR	Cisco	12/6/2017	1,497	12,129	No
4	...		Maintenance BoM	...	MaintTestNov	9,261.45	13,646.56	Cisco CCWR	Cisco	11/29/2017	13	118	No
5	...		Maintenance BoM	...	MaintTestNov	1,990.45	2,585.00	Cisco CCWR	Cisco	12/6/2017	150	156	No
6	...		Maintenance BoM	...	MaintTestNov	968.66	1,258.00	Cisco CCWR	Cisco	12/6/2017	1	10	No
7	...	VALID	Cisco Estimate	...	...	54,585.54	85,776.00	Cisco Direct	CISCO	1/6/2018	8	24	No
8	...	VALID	Cisco Estimate	...	...	14,319.75	23,475.00	Cisco Direct	CISCO	8/17/2017	4	11	No
9	...	VALID	Deal Registration / O...	...	...	1,990,261.86	4,716,443.00	Cisco Direct	CISCO	8/9/2017	79	203	No
10	...	VALID	Cisco Estimate	...	...	33,698.73	54,021.00	Cisco Direct	CISCO	4/17/2018	19	26	No
11	...		Disti BoM	...	...	172,127.10	172,127.10		Disti	4/17/2018	39	147	No
12	...		Disti BoM	...	...	102,583.86	102,583.86		Disti	2/22/2018	6	18	No
13	...		Disti BoM	...	...	6,360.00	12,000.00	Altus	Disti	2/22/2018	1	1	No
14	...		Disti BoM	...	...	3,120.17	3,466.50	Altus	Disti	2/22/2018	2	6	No
15	...		Deal Registration / O...	...	...	218,299.00	349,475.26	Cisco Direct	CISCO	12/21/2017	46	128	No
					...	1,035,338.44	1,398,576.29	Cisco CCWR	Cisco	11/19/2017	291	2,747	No

21-Jakes List Spartanburg Region MQ Oro New Test

A yellow summary bar at the top of the window indicates how many BoMs have been selected. For example, shown below –

Selected BoMs: 0 BoM items selected: 0 (0 priced) BoM Source: Account BoMs (idan_test)

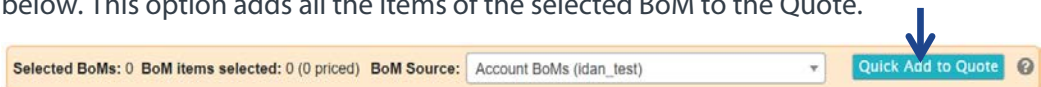
4.6 Selecting and Copying BoM Items into the Quote

The following describes how to select the relevant BoM items and then how to copy them into the Quote.

4.6.1 Selecting the BoM Items to Be Copied into the Quote

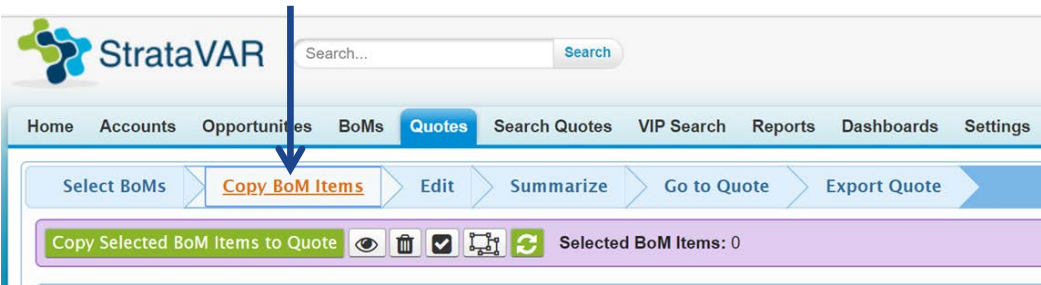
There are two ways to add the items of the selected BoMs to the Quote.

Click the **Quick Add to Quote** button at the top right of the window, as shown below. This option adds all the items of the selected BoM to the Quote.



– OR –

Click the **Copy BoMs Items** tab at the top of the window, as shown below –



The following displays –

BoM Header

Boxes Containing Items

Item Inside a Box

BoM Name	Line Number	Part Number	Description	Unit List Price	Qty	Ext List Price	Dsc (%)	Ext Net Price	Vendor	Name	Part Number	List Price	Qty	Total List Price	VAR Dsc	VAR Unit Cost	VAR Total Cost
...1 - CAB-AC-CBK-TWLKt - Quote Qty: 22						1,515,892.00	35.18	982,576.64									
PN35589230 ...1.0 CAB-AC-CBK-T Power Cord, 25	45.00	22		990.00	39.00	603.90			Cisco								0.00
...2 - GLC-SX-MMD= - Quote Qty: 50						25,000.00	39.00	15,250.00									
PN35589230 ...2.0 GLC-SX-MMD= 1000BASE-SX	500.00	50		25,000.00	39.00	15,250.00			Cisco								0.00
...3 - SFP-10G-LRM= - Quote Qty: 44						48,400.00	39.00	29,524.00									
PN35589230 ...3.0 SFP-10G-LRM= 100BASE-LRM	1,100.00	44		48,400.00	39.00	29,524.00			Cisco								0.00
...4 - SFP-GE-S-RF - Quote Qty: 1						332.00	39.00	202.52									
PN35589230 ...4.0 SFP-GE-S-RF 1000BASE-SX	332.00	1		332.00	39.00	202.52			Cisco								0.00
...5 - WS-C4506E-S7L+96V+ - Quote Qty: 8						406,976.00	25.38	303,684.80									
PN35589230 ...5.0 WS-C4506E-S7 4506-E Chassis	18,000.00	8		144,000.00	0.75	142,920.00			Cisco								0.00
PN35589230 ...5.0...1 CON-SNT-C450 SNTC-SX5XNB	1,092.00	8		8,736.00	35.00	5,678.40			Cisco								0.00
PN35589230 ...5.1 C4K-SLOT-CVR Catalyst 4500 E	0.00	16		0.00	0.00	0.00			Cisco								0.00
PN35589230 ...5.2 C4500E-LB-IPB Lan Base to IP	10,495.00	8		83,960.00	39.00	51,215.80			Cisco								0.00
PN35589230 ...5.3 C4500E-S6-LIP WS-X4748-UPC	3,450.00	8		27,600.00	39.00	16,836.00			Cisco								0.00

- The BoMs side of the window on the left displays the items in the selected BoMs.
- The Quote side of the window on the right displays the current content of the Quote, meaning all the items that have already been added to the Quote..
- The dark blue highlighted rows on the left side (called **BoMs**), each represent a BoM that you selected. The items inside each box appear underneath it is a white row. This window shows the quantity and price of the box and then the breakdown inside the box. One or more BoMs may be shown in this window.
- The lighter blue highlighted rows on the left side (called **Quote: QuoteName**), each represent a box that contains items.
- The white rows under a light blue highlighted row on the left side (called **BoMs**), each represent items inside a box.
- Items that are not inside a box appear at the top of the list under the dark blue highlighted BoM Header, but before the light blue highlighted box headers.

Items Are Shown One Opposite the Other on the Left and Right Side of the Window

When you copy items from BoMs area (on the left side of the window) to the Quote area (on the right side of the window), they are copied to the same row. So for example, in the following window rows number 1, 3 and 5 are checked in the **BoMs** area. These have been copied into the Quote.

Rows in the BoMs list that have not been checked and have not been copied into the Quote remain empty in the Quote area (on right side of the window).

In this way, items remain one opposite the other on the left and right side of the window. For example, as shown below –

PN53588230 - Copy OK - Summary: 1,515,892.00 35.18 982,576.64									
1 - CAB-AC-C6K-TWLK= - Quote Qty: 22									
PN53588230	1..0	CAB-AC-C6K-T	Power Cord, 25	45.00	22	990.00	39.00	603.90	
						990.00	39.00	603.90	QITIM-000 CAB-AC-C6K-T 45.00 22 990.00 39.00 27.45 603.90
2 - GLC-SX-MMD= - Quote Qty: 50									
PN53588230	2..0	GLC-SX-MMD=	1000BASE-SX	500.00	50	25,000.00	39.00	15,250.00	
						25,000.00	39.00	15,250.00	QITIM-000 GLC-SX-MMD= 500.00 50 25,000.00 39.00 305.00 15,250.00
3 - SFP-10G-LRM= - Quote Qty: 44									
PN53588230	3..0	SFP-10G-LRM=	10GBASE-LRM	1,100.00	44	48,400.00	39.00	29,524.00	
						48,400.00	39.00	29,524.00	QITIM-000 SFP-10G-LRM= 1,100.00 44 48,400.00 39.00 671.00 29,524.00
4 - SFP-GE-S-RF - Quote Qty: 1									
PN53588230	4..0	SFP-GE-S-RF	1000BASE-SX	332.00	1	332.00	39.00	202.52	
						332.00	39.00	202.52	QITIM-000 SFP-GE-S-RF 332.00 1 332.00 39.00 202.52 202.52
5 - WS-C4506E-S7L+9EV+ - Quote Qty: 8									
PN53588230	5..0	WS-C4506E-S7	4506-E Chassis	18,000.00	8	144,000.00	0.75	142,920.00	
						144,000.00	0.75	142,920.00	QITIM-000 WS-C4506E-S7 18,000.00 8 144,000.00 0.75 17,865.00 142,920.00
PN53588230	5..0..1	CON-SNT-C450	SNTC-8X5XNB	1,092.00	8	8,736.00	35.00	5,678.40	
						8,736.00	35.00	5,678.40	QITIM-000 CON-SNT-C450 1,092.00 8 8,736.00 35.00 709.80 5,678.40
PN53588230	5..1	C4K-SLOT-CVF	Catalyst 4500 E	0.00	16	0.00	0.00	0.00	
						0.00	0.00	0.00	QITIM-000 C4K-SLOT-CVF 0.00 16 0.00 0.00 0.00 0.00
PN53588230	5..2	C4500E-LB-IPB	Lin Base to IP	10,495.00	8	83,960.00	39.00	51,215.60	
						83,960.00	39.00	51,215.60	QITIM-000 C4500E-LB-IPB 10,495.00 8 83,960.00 39.00 6,401.95 51,215.60
PN53588230	5..3	C4500E-S6-UP	WS-X4748-UPC	3,450.00	8	27,600.00	39.00	2,104.50	
						27,600.00	39.00	2,104.50	QITIM-000 C4500E-S6-UP 3,450.00 8 27,600.00 39.00 2,104.50 16,836.00
PN53588230	5..4	WS-X45-SUP7L	Catalyst 4500 E	0.00	8	0.00	0.00	0.00	
						0.00	0.00	0.00	QITIM-000 WS-X45-SUP7L 0.00 8 0.00 0.00 0.00 0.00

4.6.2 Specifying the Quantity of the BoM Boxes/Items

The **Qty** column of an item (represented by a white row in the **BoMs** area on the left) specifies the quantity of the item.

Quantity of Boxes in BoM

Quantity of Boxes in BoM

Quantity of Boxes in Quote

The screenshot displays the StrataVAR interface with the 'BoMs' and 'Quote' sections. The 'BoMs' section on the left lists items with their quantities. The 'Quote' section on the right shows the same items with their quantities in the quote. A blue bar at the top of the 'Quote' section contains the 'Quote Qty' field, which is set to 11. Three blue arrows point from the labels above to the 'Qty' columns in the 'BoMs' and 'Quote' sections, and to the 'Quote Qty' field.

BoM Name	Line Number	Part Number	Description	Unit List Price	Qty	Ext List Price	Dsc (%)	Ext Net Price	Vendor	Name	Part Number	List Price	Qty	Total List Price	VAR Dsc	VAR Unit Cost	VAR Total Cost
...1 - CAB-AC-C6K-TV	1	CAB-AC-C6K-TV	Power Cord, 25	45.00	22	990.00	39.00	603.90	Cisco	QTTIM-000	CAB-AC-C6K-T	45.00	11	495.00	39.00	27.45	301.95
...2 - GLC-SX-MMD+	2	GLC-SX-MMD+	1000BASE-SX	500.00	50	25,000.00	39.00	15,250.00	Cisco	QTTIM-000	GLC-SX-MMD+	500.00	50	25,000.00	39.00	305.00	15,250.00
...3 - SFP-10G-LRM+	3	SFP-10G-LRM+	10GBASE-LRM	1,100.00	44	48,400.00	39.00	29,524.00	Cisco	QTTIM-000	SFP-10G-LRM+	1,100.00	44	48,400.00	39.00	671.00	29,524.00
...4 - SFP-GE-S-RF	4	SFP-GE-S-RF	1000BASE-SX	332.00	1	332.00	39.00	202.52	Cisco								0.00
...5 - WS-C4506E-S7L-96W+	5	WS-C4506E-S7L-96W+	4506-E Chassis	18,000.00	8	144,000.00	0.75	142,920.00	Cisco	QTTIM-000	WS-C4506E-S7	18,000.00	8	144,000.00	0.75	17,865.00	142,920.00
...5.0.1 - CON-SNT-C45K	5.0.1	CON-SNT-C45K	500E-LB-IPB	1,092.00	8	8,736.00	35.00	5,678.40	Cisco	QTTIM-000	CON-SNT-C45K	1,092.00	8	8,736.00	35.00	709.80	5,678.40
...5.1 - C4K-SLOT-CV6	5.1	C4K-SLOT-CV6	Catalyst 4500 E	0.00	16	0.00	0.00	0.00	Cisco	QTTIM-000	C4K-SLOT-CV6	0.00	16	0.00	0.00	0.00	0.00
...5.2 - C4500E-LB-IPB	5.2	C4500E-LB-IPB	Lin Base to IP	10,495.00	8	83,960.00	39.00	51,215.60	Cisco	QTTIM-000	C4500E-LB-IPB	10,495.00	8	83,960.00	39.00	6,401.95	51,215.60
...5.3 - C4500E-S6-UP	5.3	C4500E-S6-UP	WS-X4748-UPC	3,450.00	8	27,600.00	39.00	16,836.00	Cisco	QTTIM-000	C4500E-S6-UP	3,450.00	8	27,600.00	39.00	2,104.50	16,836.00
...5.4 - WS-X45-SUP7L	5.4	WS-X45-SUP7L	Catalyst 4500 E	0.00	8	0.00	0.00	0.00	Cisco	QTTIM-000	WS-X45-SUP7L	0.00	8	0.00	0.00	0.00	0.00

The **Quote Qty** field in the light blue bar specifies the quantity of boxes to be copied into the Quote when you click the **Copy Selected BoM Items to Quote** button.

You can enter any quantity to be copied into the Quote that is less than the number that exists in the original BoM (in order to maintain validity).

For example, in the first box blue bar called **CAB-AC-C6K-T**, the value of the quantity column is 22, meaning that there are 22 power cords. The **Quote Qty** field in the blue bar only specifies 11 to be moved to the Quote.

When you copy a box into a Quote with the quantity 3, then each item row is copied into the Quote with 3 times its quantity. For example, if a box contains 4 routers and 2 cables, then copying the box quantity 3, places 12 routers and 6 cables into the Quote.

4.6.3 Copying Items into the Quote


The following describes how to copy BoM items into the Quote.

- You can select to copy all a BoM's items into the Quote or select specific items of a BoM to be copied.
- You can remove or add new items in a Quote at any time by clicking the **Edit Quote** button.


Check the checkboxes of the boxes and items to be added to the Quote.

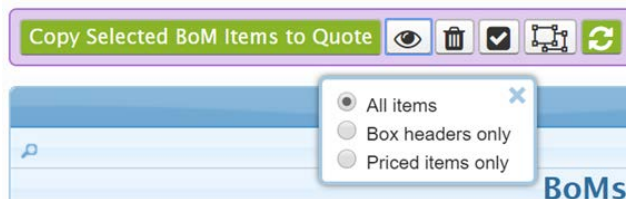
All the tasks described below copy items into the Quote. They do not affect the BoM itself. The BoM always remains the same as it was imported from the source.


You can –

- **Select All** – Select the **Select All**  button to copy all the items of all the BoMs listed on the left into the Quote.
- **Adding Box Items to the Quote** – Select the checkbox of a box (the dark blue line) to copy all the items in it to the Quote.

Note – An item in the box cannot be copied to the Quote on its own. Only a box containing all its items can be added.

- **Filter the BoM List Display** – Click the  button to display a dropdown menu of filters that enables you to filter the list to display to show **All Items**, **Box Headers Only** or **Priced Items Only** (meaning that the price is not zero).



- **Delete Selected Quote Items** – To remove BoMs, boxes or items from the Quote (which appeared on the right side of the window), select the relevant items in the left side of the window, and then click the **Trash**  button. The BoM itself is not affected, but these items will be removed from the Quote on the right side of the window. These items will still be shown on the left side of the window.

4.7 Editing a Quote – Costing and Pricing Items

This stage enables you to perform highly productive, error-free, bulk operations for costing and pricing in an efficient manner.

There are two ways to edit a Quote after it has been created and saved –

- Click the **Edit** tab in the **Quotes** tab to edit the currently displayed Quote, as shown below –

The screenshot shows the StrataVAR interface. At the top, there's a search bar and a navigation menu with tabs: Home, Accounts, Opportunities, BoMs, **Quotes**, Search Quotes, VIP Search, Reports, Dashboards, and Settings. Below the navigation menu, there's a sub-menu with buttons: Select BoMs, Copy BoM Items, **Edit** (highlighted with a blue arrow), Summarize, Go to Quote, and Export Quote. Below this, there's a summary table with the following data:

Total List Price:	\$480,871.00	Customer Total Price:	\$480,871.00	Customer Discount:	0.00 (0.00%)
VAR Total Cost:	\$348,760.75	VAR Total Profit:	\$132,110.25 (%27.47)	VAR Discount:	132,110.25 (27.47%)
Selected Quote Items:	0	Quote Start Date:	Click to set	Quote End Date:	Click to set

Below the table, there's a form with a dropdown menu labeled "Select a column", a dropdown menu labeled "x Set to X", a text input field labeled "Enter a value", and a button labeled "Update Selected Items".

– OR –

- Select the **Quotes** tab to see a list of Quotes and then click one of the listed Quotes to display the **Quote Detail** page. For example, as shown below –

The screenshot shows the StrataVAR interface with the **Quotes** tab selected. On the left, there's a sidebar with a "Create New..." button and a list of "Recent Items" including QT-000003059, MQ62749253PB, Acme_Oco, Lenn_Cohen_Oco1, QT-000003060, 2527388-471519..., 006-003055, 006-003054, and 006-003053. Below the list is a "Recycle Bin" button. The main area displays the "Quote Detail" for Quote QT-000003059. The quote is associated with Account Acme Account, Contact Sales Engineer, and Quote Auto Number QT-000003059. The quote is active and owned by Stan Yarns. The quote type is QT-000003059, and the quote name is Acme_Oco. The quote version is 1, and the quote special note is Acme_Oco. The quote status is Active, and the quote price deviation is 0.00. The quote purchase order number is 143. The quote related deal is 143, and the quote ship to party is 143. The quote co-term date is 143, and the quote begin date is 143. The quote end date is 143, and the quote summary quote is 143. The quote associated quote is 143, and the quote total quote line items is 143.

Click the **Edit Quote** button. The following window displays in which you can edit the Quote –

StrataVAR Search

Switch to Lightning Experience Rafi Dev3-Epstein Help StrataVAR

Home Accounts Opportunities BoMs **Quotes** Search Quotes VIP Search Reports Dashboards Settings Configure Help PQW Templates Rebates

Select BoMs Copy BoM Items **Edit** Summarize Go to Quote Export Quote

Total List Price: \$480,871.00 Customer Total Price: \$480,871.00 Customer Discount: 0.00 (0.00%)
VAR Total Cost: \$348,760.75 VAR Total Profit: \$132,110.25 (%27.47%) VAR Discount: 132,110.25 (27.47%) Total Profit + VIP: 134,956.25 (27.88%)
Selected Quote Items: 0 Quote Start Date: Click to set Quote End Date: Click to set

Select a column * Set to X Enter a value Update Selected Items

Quote: QT-000002127-STD_USR_Longform-STD_USR_Longform (Account: [dan-test])

Name	Part Number	Description	List Price/MRC	Term (M)	Qty	Total List Price	VAR Disc (%)	VAR Total Cost	VAR Mrgn (%)	VAR Mkup (%)	VAR Unit Margin	VAR Total Profit	Cost Disc (%)	Cost Unit Price	Cost Ext Price	Item Type	Unit	Vendor
...1 - CAB-AC-C6K-TWLK+ - Qty: 11						495.00	36.00	301.95				193.05	0.00		495.00			
QITIM-00 CAB-AC-C6 Power Cord, 250Vac 16a			45.00		11	495.00	39.00	301.95	39.00	63.93	17.55	193.05	0.00	45.00	495.00	Hardware		Cisco
...2 - GLC-SX-MMD+ - Qty: 50						25,000.00	39.00	15,250.00				9,750.00	0.00		25,000.00			
QITIM-00 GLC-SX-MMD 1000BASE-SX SFP tran			500.00		50	25,000.00	39.00	15,250.00	39.00	63.93	195.00	9,750.00	0.00	500.00	25,000.00	Hardware		Cisco
...3 - SFP-10G-LRM+ - Qty: 44						48,400.00	36.00	29,524.00				18,876.00	0.00		48,400.00			
QITIM-00 SFP-10G-LF 10GBASE-LRM SFP Mg			1,100.00		44	48,400.00	39.00	29,524.00	39.00	63.93	429.00	18,876.00	0.00	1,100.00	48,400.00	Hardware		Cisco
...5 - WS-C4506E-S7L96V+ - Qty: 8						406,976.00	25.38	303,684.80				103,291.20	0.00		406,976.00			
QITIM-00 WS-C4506E 4506-E Chassis, two WS			18,000.00		8	144,000.00	0.75	142,920.00	0.75	0.76	135.00	1,080.00	0.00	18,000.00	144,000.00	Hardware		Cisco
QITIM-00 CCN-SNT-C SNTC-SX5XNBD 4506-E			1,092.00		8	8,736.00	35.00	5,678.40	35.00	53.85	382.20	3,057.60	0.00	1,092.00	8,736.00	Service		Cisco
QITIM-00 C4K-SLOT- Catalyst 4500 E-Series f			0.00		18	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Hardware		Cisco
QITIM-00 C4500E-LB-Len Base to IP Base Ice			10,495.00		8	83,960.00	39.00	51,215.60	39.00	63.93	4,093.05	32,744.40	0.00	10,495.00	83,960.00	Hardware		Cisco
QITIM-00 C4500E-S6-WS-X4748-UPOE+E Up			3,450.00		8	27,600.00	39.00	16,836.00	39.00	63.93	1,345.50	10,764.00	0.00	3,450.00	27,600.00	Hardware		Cisco

Quote Totals
Summary

Pricing
Operations

Item/Box
Quote Items



Pricing a Quote

This chapter describes how to price the items in the StrataVAR PQW internal Quote and to define its discounts margins and so on.

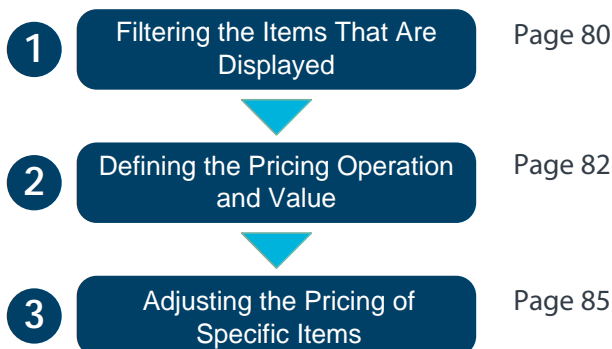
5.1 Pricing – Introduction

In the step, you specify the cost/price, discounts, margins and so on for a Quote by specifying percentages and or specific values. StrataVAR PQW supports a standard *list price – less discount* approach to pricing, as well as flat pricing and cost-plus pricing.

You can also focus your cost/price, discounts and margin calculation efforts on specific types of items, such as hardware, SMARTnet, software, SaaS and so on.

There are primarily two sides to the pricing equation – the cost that the supplier charges the VAR and the price that the VAR charges the end customer.

5.2 Pricing – Workflow



5.3 Filtering the Quote Items That Are Displayed

The **Pricing Operations** area of the Quote Editing window (shown below) provides a variety of column headers that enable you to adjust the values of all the displayed items at the same time. Only those columns in the **Search a column** box are editable.

Example 1

For example, when the VAR gets a 42% discount for a specific type of item, such as a service, you can enter a discount of 42% in the headers of the **VAR Dsc%** column.

Example 2

In the **Item Type** column, select **Service**, as shown below –

Home

Accounts

Opportunities

BOLs

Quotes

Search Quotes

VIP Search

Reports

Dashboards

Cisco

PCW Templates

Quote Notes Library

Settings

Configure

Help

Batch

Issue Manager

+

Select BOLs

Copy BOL Items

Filter

Summarize

Go to Quote

Export Quote

Total List Price: \$130,716.00

Customer Total Price: \$130,716.00

0.00 (0.00%)

VAR Total Cost: \$40,603.80

VAR Total Profit: \$90,022.20 (68.87%)

VAR Discount: 90,022.20 (68.87%)

Selected Quote Items: 34

Quote Start Date: Click to set

Quote End Date: Click to set

Total Profit + VIP: \$90,022.20 (68.87%)

* VAR Dsc (%)

* Set to X

42

Update Selected Items

Print

Copy

Refresh

Close

Cancel

Save

Print

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Print

Print

Print

Print

Print

Print

Print

Print

Print

Print

Print

Print

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Example 3

To filter by only hardware items in a Quote, in the **Item Type** column select **Hardware**. This action only shows hardware items. You can then select a specific hardware item(s) and change the **VAR Mrgn (%)** margin to 10%.

HomeAccountsOpportunitiesBoMsQuotesSearch QuotesVIP SearchReportsDashboardsCiscoPQW TemplatesQuote Notes LibrarySettingsConfigureHelpBatchesQueue Manager

Select BoMsCopy Bold ItemsFilterSummarizeGo to QuoteExport Quote

Total List Price: \$130,716.00Customer Total Price: \$130,716.00Customer Discount: 0.00 (0.00%)VAR Total Cost: \$40,083.80VAR Total Profit: \$60,022.20 (68.87%)VAR Discount: 90,022.20 (68.87%)Total Profit + VIP: 90,022.20 (68.87%)Selected Quote Items: 34Quote Start Date: Click to setQuote End Date: Click to set

* VAR Mrgn (%) * * Set to X * 10 Update Selected Items

Quote: QT-000002927_InetJun18_InetJun18 (Account: Man_1818)

Page 1 of 1130View 1 - 20 of 20

Name	Part Number	Description	List Price/MRC	Term (M)	Qty	Total List Price	VAR Dsc (%)	VAR Total Cost	VAR Mrgn (%)	VAR Mktg (%)	VAR Unit Margin	VAR Total Profit	Cost Unit Price	Cost Ext Price	Item	Unit	Vendor
X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
	1 - WS-C3850-48P-E	Qty: 6				40,474.00	0.00	14,779.00				33,094.20	0.00	40,474.00			
	QTTM-000173: WS-C3850-48P-E	Cisco Catalyst 3650 48 Port P/E 4x1	7,300.00	0.00	6	43,800.00	72.00	12,798.00	72.00	257.14	5,472.00	32,832.00	0.00	7,600.00	45,930.00	Hardware	Cisco
	QTTM-000173: 93650UKD-163	UNIVERSAL	0.00	0.00	6	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Hardware	Cisco
	QTTM-000173: PWR-C2-640WAC	640W AC Config 2 Power Supply	0.00	0.00	6	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Hardware	Cisco
	QTTM-000173: CAB-TA-NA	North America AC Type A Power Cab	0.00	0.00	6	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Hardware	Cisco
	QTTM-000173: STACK-T2-BLANK	Type 2 Stacking Blank	0.00	0.00	6	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Hardware	Cisco
	QTTM-000173: PWR-C2-BLANK	Config 2 Power Supply Blank	0.00	0.00	6	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Hardware	Cisco
	3 - C3850-48P-E-Qty 2					30,406.00	0.00	9,060.60				20,445.20	0.00	30,406.00			
	QTTM-000173: C3850-48P-E	Catalyst 9300 48-port PoE+ Network	9,490.00	2	18,980.00	72.00	5,314.40	72.00	257.14	6,832.80	13,005.60	0.00	9,490.00	18,980.00	Hardware	Cisco	
	QTTM-000173: C3850 DNA E 48	C3850 DNA Essentials, 48-Port Netw	0.00	2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Hardware	Cisco

Example 4

To give a discount to a customer for all of its part numbers that begin with the letters CON, in order to give a discount of 3%, in the **Select a Column** field select **Cust Dsc (%)** and then increase the percentage by 3.

The screenshot shows the StrataVAR interface with the 'Cust Dsc (%)' field set to 3%. The 'Total List Price' is \$130,716.00, 'Customer Total Price' is \$130,716.00, 'Customer Discount' is 0.00 (0.00%), 'VAR Total Price' is \$40,813.80, 'VAR Total Profit' is \$90,022.20 (68.87%), 'VAR Discount' is 90,022.20 (68.87%), 'Quote End Date' is blank, and 'Total Profit + VIP' is 90,022.20 (68.87%). The 'Cust Dsc (%)' field is set to 3%.


Name	Part Number	Description	List Price/Unit	Term (Mo)	Qty	Total List Price	VAR Dsc (%)	VAR Total Cost	VAR Margin (%)	VAR Unit Margin	VAR Total Profit	Cust Dsc (%)	Cust Unit Price	Cust Ext Price	Item Type	Unit	Vendor
QTTM000179	WS-C3850-48PS-L	Cisco Catalyst 3850 48 Port Pwr 48x1	7,000.00		6	42,000.00	0.00	42,000.00	0.00	0.00	0.00	0.00	0.00	0.00	Hardware	Cisco	
QTTM000179	CON-SNT-WS6848-SNTC-BX320ND	Cisco Catalyst 3850	475.00		6	2,850.00	30.00	2,010.00	30.00	42.00	143.70	892.20	0.00	475.00	2,850.00	Service	Cisco
QTTM000179	S3650-K9-183	UNIVERSAL	0.00		6	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Hardware	Cisco	
QTTM000179	PWR-C2-64WAC	847W AC Config 2 Power Supply	0.00		6	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Hardware	Cisco	
QTTM000179	CAG-TANA	North America AG Type A Power Cab	0.00		6	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Hardware	Cisco	
QTTM000179	STACK-T2-BLANK	Type 2 Stacking Blank	0.00		6	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Hardware	Cisco	
QTTM000179	PWR-C2-BLANK	Config 2 Power Supply Blank	0.00		6	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Hardware	Cisco	
QTTM000179	CRK000-48P-E	Catalyst 9300 48-port Pwr E Network	9,490.00		2	18,980.00	72.00	5,314.40	72.00	25.74	8,832.80	13,665.60	0.00	9,490.00	18,980.00	Hardware	Cisco
QTTM000179	CON-SNT-CR0004-SNTC-BX320ND	Catalyst 9300 48-port	598.00		2	1,196.00	30.00	837.20	30.00	42.00	179.40	358.80	0.00	598.00	1,196.00	Service	Cisco

The procedure of adjusting the cost/price of the entire Quote may be an iterative process in which you may change the values multiple times, optionally using different filters, until you get the Quote just right. In general, this process is primarily comprised of the following stages –

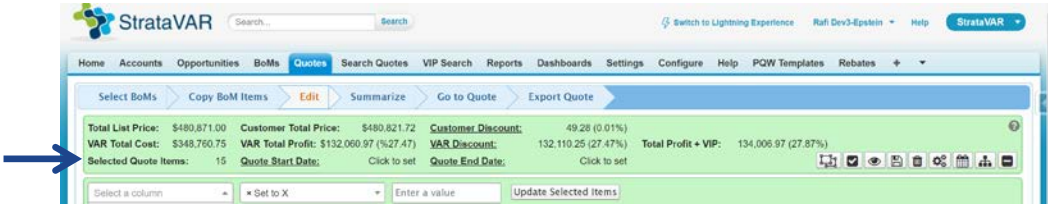
- Filtering the display of the rows of items, so that only the items whose cost/price you want to adjust by the same amount or percentage are displayed. For example, if you want to adjust the cost/price of all hardware items, then select the value **Hardware** from the **Item Type** column, as shown below –

The screenshot shows the StrataVAR interface with the 'Item Type' column filtered to 'Hardware'. The 'Total List Price' is \$480,871.00, 'Customer Total Price' is \$480,821.50, 'Customer Discount' is 49.50 (0.01%), 'VAR Total Cost' is \$348,760.75, 'VAR Total Profit' is \$132,060.75 (27.47%), 'VAR Discount' is 132,110.25 (27.47%), 'Quote End Date' is blank, and 'Total Profit + VIP' is 134,006.75 (27.87%). The 'Cust Dsc (%)' field is set to 3%.

Name	Part Number	Description	List Price/Unit	Term (Mo)	Qty	Total List Price	VAR Dsc (%)	VAR Total Cost	VAR Margin (%)	VAR Unit Margin	VAR Total Profit	Cust Dsc (%)	Cust Unit Price	Cust Ext Price	Item Type	Unit	Vendor
QTTM000179	CAB-AC-CH-7W18x-1	Power Cord 250W 18x	45.00		11	495.00	30.00	301.95	32.22	47.54	13.05	143.55	10.00	445.50	Hardware	Cisco	
QTTM000179	GLC-SK-MD-C	100BASE-SX SFP	500.00		50	25,000.00	30.00	15,250.00	30.00	63.00	9,750.00	0.00	500.00	25,000.00	Hardware	Cisco	
QTTM000179	SFP-10G-LR	100BASE-LRM SFP	1,100.00		44	48,400.00	30.00	29,524.00	30.00	63.00	18,876.00	0.00	1,100.00	48,400.00	Hardware	Cisco	
QTTM000179	WS-C4506E-48GE-E	Chassis, two 5VE	18,000.00		8	144,000.00	0.75	142,920.00	0.75	0.78	138.00	1,980.00	0.00	18,000.00	144,000.00	Hardware	Cisco
QTTM000179	CON-SNT-CR0004-SNTC-BX320ND	4506-E	1,092.00		8	8,736.00	30.00	5,978.40	30.00	53.88	382.23	3,067.82	0.00	1,092.00	8,736.00	Service	Cisco
QTTM000179	C4K-SLOT-C	Catalyst 4500 E-Series	0.00		16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Hardware	Cisco	
QTTM000179	C4506E-LB-Lan Base to IP Base lic		10,495.00		8	83,960.00	30.00	51,215.60	30.00	63.00	4,093.05	32,744.40	0.00	10,495.00	83,960.00	Hardware	Cisco
QTTM000179	C4506E-S6-WX-M748-UPDGE-E	Up	3,450.00		8	27,600.00	30.00	18,936.00	30.00	63.00	1,345.50	10,764.00	0.00	3,450.00	27,600.00	Hardware	Cisco

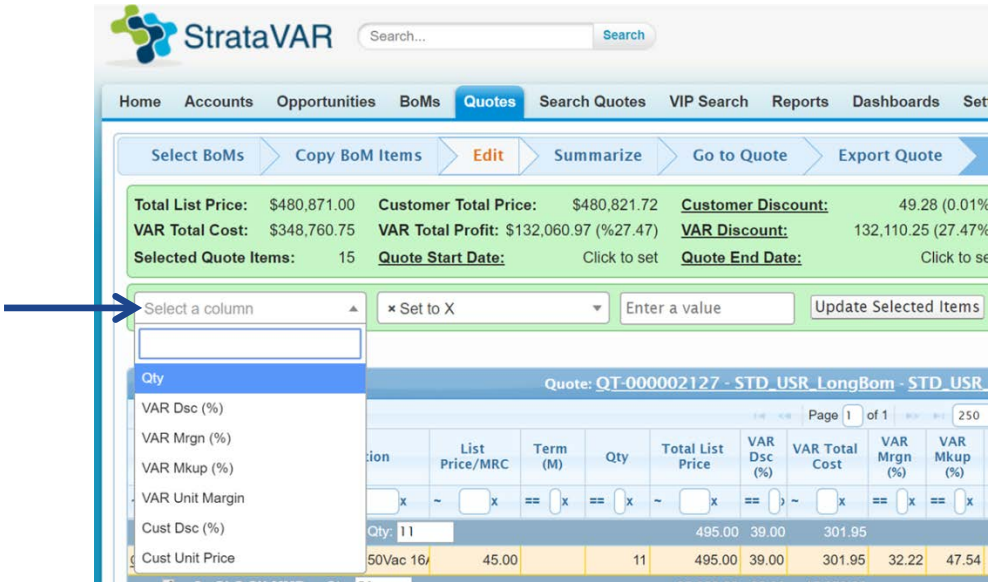
Click the **Select All**  button to select all the displayed items, meaning all the **Hardware** items or check the checkbox(es) of the item(s) you want to select.

The **Selected Quote Items** field at the top left of the window indicates how many items will be affected. In the example below is **15**.



5.4 Defining the Pricing Operation and Value

The following area is provided in order to enable you to define the pricing operation applied to a specific column of the displayed rows –



► **To set the pricing (cost/price) –**

- 1 In the **Select a column** field on the left, select the name of one of the columns in the Quote, as shown above. For example, the **VAR Dsc (%)** and **Cust Dsc (%)** enable you to modify the percentage of the discount of the VAR and the customer accordingly. **VAR Dsc (%)** is selected in the example below.
- 2 In the field to its right, select one of the operations to perform on the values of that column for all the displayed rows. For example, **Set to X**, as shown below. The value of **X** is defined in the adjacent field to the right, as described below.

The screenshot shows the 'Quote' tab in the StrataVAR software. A dropdown menu is open for the 'VAR Dsc (%)' column, showing options like 'Set to X', 'Increment by X', 'Increase by X percent', and 'Multiply by X'. The 'Set to X' option is selected, and the value '42' is entered in the adjacent field. The interface also shows a table of quote items with columns for Name, Part Number, Unit, Price, and various discount fields.

- **Increment by X** – Adds the value from the column. For example if one line has 40% VAR Discount and the next has 50%, **Increment by X** with the value of 2 sets the numbers to 42 and 52, respectively. Similarly, if the value is -2, the values are set to 38 and 48, respectively. Note that negative values can be used.
 - **Increase by X Percent** – This option means that if the value is set to 10, the old values are multiplied by 100% (1.1). Therefore, in this case, a VAR Discount of 40% and 50% are set to 44% and 55%, respectively. Similarly, an increase of -10 sets the previous 40% and 50% values to 36% and 45%, respectively.
 - **Multiply by X** – This option simply multiplies by the value. Therefore, if the value is 1.2, 40% and 50% are set to 48% and 60%, respectively. You can also change absolute dollar values in the same manner.
- 3 In the **Enter a value** field, specify the value to be applied in the operation that was defined in the step above. Set the value in \$ or %, depending on the operation (described above).

The screenshot shows the 'Quote' tab in the StrataVAR software. The 'VAR Dsc (%)' column is selected, and the 'Set to X' operation is chosen. The value '44' is entered in the adjacent field. The 'Update Selected Items' button is visible.

The following window shows a Quote before the pricing operation above was applied.

The screenshot shows the StrataVAR software interface. At the top, there's a navigation bar with tabs like Home, Accounts, Opportunities, BoMs, Quotes, Search Quotes, VIP Search, Reports, Dashboards, Settings, Configure, Help, PQW Templates, and Rebates. Below this, there's a summary section with fields for Total List Price, Customer Total Price, Customer Discount, VAR Total Cost, VAR Total Profit, VAR Discount, and Total Profit + VIP. A green bar at the bottom of the summary section contains the 'Update Selected Items' button, which is highlighted by a blue arrow.

Name	Part Number	Description	List Price/MRC	Term (M)	Qty	Total List Price	VAR Dsc (%)	VAR Total Cost	VAR Margin (%)	VAR Unit Margin	VAR Unit Profit	Cost Dsc (%)	Cost Unit Price	Cost Ext Price	Item Type	Unit	Vendor
1	CAB-AC-C6K-TWLK	Qty: 11	45.00		11	495.00	39.00	301.95	18.28	195.00	8,790.00	0.00	500.00	25,000.00	Hardware		Cisco
2	GLC-SX-MMD	Qty: 50	500.00		50	25,000.00	39.00	15,250.00	39.00	63.93	195.00	0.00	500.00	25,000.00	Hardware		Cisco
3	SFP-10G-LRM	Qty: 44	1,100.00		44	48,400.00	39.00	29,524.00	39.00	63.93	429.00	0.00	1,100.00	48,400.00	Hardware		Cisco
5	WS-C4506E-S7L-96W	Qty: 8	18,000.00		8	144,000.00	0.75	142,920.00	0.75	0.76	135.00	0.00	18,000.00	144,000.00	Hardware		Cisco
6	C4K-SLOT-4 Catalyst 4500 E-Series	Qty: 16	0.00		16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Hardware		Cisco

- Click the **Update Selected Items** button to apply this pricing operation to all the displayed items. For example, the following is the Quote (that is shown above), after the pricing operation shown above has been applied –

The screenshot shows the same StrataVAR software interface, but after the pricing operation. The 'Update Selected Items' button is now highlighted by a blue arrow. The summary section at the top shows updated values: Total List Price: \$480,871.00, Customer Total Price: \$480,821.72, Customer Discount: 49.28 (0.01%), VAR Total Cost: \$270,074.00, VAR Total Profit: \$210,747.72 (%43.83), VAR Discount: 210,797.00 (43.84%), and Total Profit + VIP: 212,693.72 (44.24%). The table below shows the updated values for the items, with the 'VAR Dsc (%)' column now showing 44.00 for all items.

Name	Part Number	Description	List Price/MRC	Term (M)	Qty	Total List Price	VAR Dsc (%)	VAR Total Cost	VAR Margin (%)	VAR Unit Margin	VAR Unit Profit	Cost Dsc (%)	Cost Unit Price	Cost Ext Price	Item Type	Unit	Vendor
1	CAB-AC-C6K-TWLK	Qty: 11	45.00		11	495.00	44.00	277.20	37.78	60.71	15.30	168.30	10.00	445.50	Hardware		Cisco
2	GLC-SX-MMD	Qty: 50	500.00		50	25,000.00	44.00	15,900.00	36.00	18.33	225.00	0.00	500.00	25,000.00	Hardware		Cisco
3	SFP-10G-LRM	Qty: 44	1,100.00		44	48,400.00	44.00	27,104.00	44.00	78.57	21,296.00	0.00	1,100.00	48,400.00	Hardware		Cisco
5	WS-C4506E-S7L-96W	Qty: 8	18,000.00		8	144,000.00	44.00	80,840.00	44.00	78.57	7,820.00	0.00	18,000.00	144,000.00	Hardware		Cisco
6	C4K-SLOT-4 Catalyst 4500 E-Series	Qty: 16	0.00		16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Hardware		Cisco

As you can see, the value in the **VAR Dsc (%)** has been changed from **39** to **44** in all the selected items.

The aggregated values in the green area at the top of the window present a summary of the value of the Quote. These values are updated automatically. For example, the **Total Profit + VIP** value.

5.5 Adjusting the Pricing of Specific Items

You can adjust the cost/price values of each item separately by simply double-clicking a field in a row and typing in the new value, as shown below. This operation is known as inline editing –

The screenshot displays the StrataVAR software interface in 'Edit' mode for a quote. The top navigation bar includes the StrataVAR logo and a search bar. Below the navigation bar, a menu contains options like 'Home', 'Accounts', 'Opportunities', 'BoMs', 'Quotes', 'Search Quotes', 'VIP Search', 'Reports', 'Dashboards', 'Settings', 'Configure', 'Help', 'PQW Templates', and 'Rebates'. The main area shows a summary of the quote with fields for 'Total List Price', 'Customer Total Price', 'Customer Discount', 'VAR Total Cost', 'VAR Total Profit', 'VAR Discount', 'Quote Start Date', 'Quote End Date', and 'Total Profit + VIP'. Below this is a table with columns for 'Name', 'Part Number', 'Description', 'List Price/MRC', 'Term (M)', 'Qty', 'Total List Price', 'VAR Dsc (%)', 'VAR Total Cost', 'VAR Margin (%)', 'VAR Markup (%)', 'VAR Unit Margin', 'VAR Total Profit', 'Cust Dsc (%)', 'Cust Unit Price', 'Cust Ext Price', 'Item Type', 'Unit', and 'Vendor'. The first row of the table is highlighted, and a blue arrow points to the 'VAR Unit Margin' field, which is currently set to 63.93. The table contains several rows of data, including items like 'CAB-AC-C6K-TWLK', 'GLC-SX-MMD', 'SFP-10G-LRM', 'SFP-10G-LF 10GBASE-LRM SFP M', 'WS-C4506E-S7L+96V', 'WS-C4506E 4506-E Chassis, two WS', 'CON-SNT-C SNTC-8X5XNBD 4506-E', 'CAK-SLOT-C Catalyst 4500 E-Series f', 'C4500E-LB-Lan Base to IP Base lce', and 'C4500E-S6-WS-X4748-UPOE+E Up'.

No save operation is required. Auto-save and manual-save options are available.

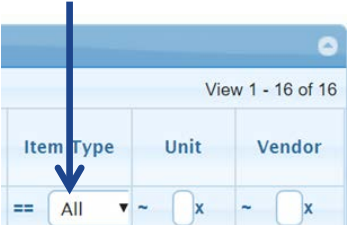
To edit the field of another item, simply click it in the same way as above.

Alternatively, you can use the up and down **Arrow** keys to navigate between items (rows) and the **Tab** key and **Shift Tab** key to navigate right and left between columns.

5.6 Example – Applying a 10% Markup to the Entire Quote

► To apply 10% markup to the entire Quote –

1 In the **Item Type** column, select **All**.



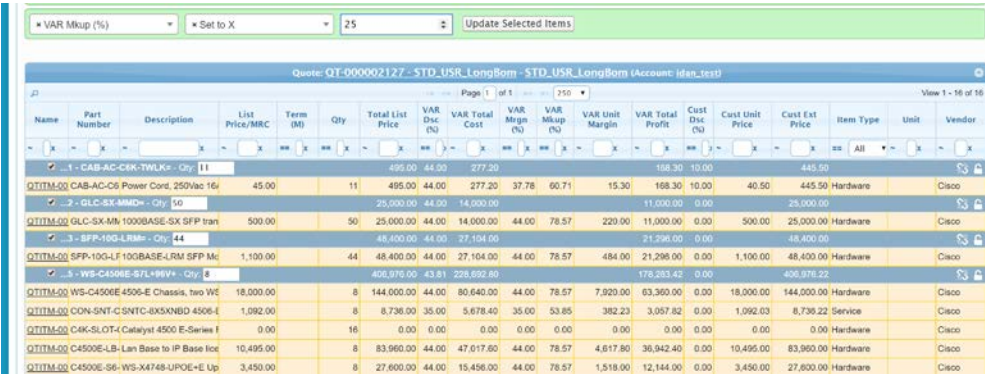
2 Click the **Select All**  button.

3 In the **Select a column** field, select the name of one of the columns in the Quote, as shown above. For example, the **VAR Mkup (%)**.

4 In the field to its right, select one of the operations to perform on the values of that column for all the displayed rows. For example, **Set to X**.

5 In the **Enter a value** field, type **25**.

For example, as shown below –



- Click the **Update Selected Items** button to apply this pricing operation to all the items.

The screenshot shows the StrataVAR interface with a quote window. The top navigation bar includes buttons like 'Select BoMs', 'Copy BoM Items', 'Edit', 'Summarize', 'Go to Quote', and 'Export Quote'. The 'Edit' button is highlighted with a blue arrow. Below the navigation bar, a green summary area displays key pricing information: Total List Price (\$480,871.00), Customer Total Price (\$337,502.50), Customer Discount (143,278.50 (29.80%)), VAR Total Cost (\$270,074.00), VAR Total Profit (\$67,518.50 (%20.00)), VAR Discount (210,797.00 (43.84%)), and Total Profit + VIP (69,464.50 (20.58%)). Below this, a table lists items with columns for Name, Part Number, Description, List Price/MRC, Term (M), Qty, Total List Price, VAR Dsc (%), VAR Total Cost, VAR Mrgn (%), VAR Mkup (%), VAR Unit Margin, VAR Total Profit, Cost Dsc (%), Cust Unit Price, Cust Ext Price, Item Type, Unit, and Vendor. A blue arrow points to the 'Cust Unit Price' column, which has been updated from 31.50 to 23.63. The 'Update Selected Items' button is also visible in the bottom right of the summary area.

As you can see, the value in the **Customer Total Price** field at the top left of the window and in the **Cust Unit Prices** field have been reduced by 25%.

5.6.1 Aggregation and Summary Area

The green area at the top of the window shows summary information about the Quote. When you hover over a field in this area, a breakdown for the selected value displays by item type, as shown below –

The screenshot shows the StrataVAR interface with a quote window. The top navigation bar includes buttons like 'Select BoMs', 'Copy BoM Items', 'Edit', 'Summarize', 'Go to Quote', and 'Export Quote'. The 'Edit' button is highlighted with a blue arrow. Below the navigation bar, a green summary area displays key pricing information: Total List Price (\$1,515,892.00), Customer Total Price (\$1,214,902.00), Customer Discount (300,989.40 (19.86%)), VAR Total Cost (\$968,669.40), VAR Total Profit (\$245,233.20 (%20.43%)), VAR Discount (549,222.60 (36.23%)), and Total Profit + VIP (248,233.20 (20.43%)). Below this, a table lists items with columns for Name, Part Number, Description, List Price/MRC, Term (M), Qty, Total List Price, VAR Dsc (%), VAR Total Cost, VAR Mrgn (%), VAR Mkup (%), VAR Unit Margin, VAR Total Profit, Cost Dsc (%), Cust Unit Price, Cust Ext Price, Item Type, Unit, and Vendor. A blue arrow points to the 'Customer Total Price' field, which has a tooltip displayed showing a breakdown of the total price by item type: Hardware (\$242,981.60 (%20.63)), SaaS (\$0.00 (%0.00)), Software (\$0.00 (%0.00)), Services (\$5,251.60 (%14.11)), Prof. Services (\$0.00 (%0.00)), Training (\$0.00 (%0.00)), Managed Services (\$0.00 (%0.00)), and Other (\$0.00 (%0.00)).

Each of the fields in the green area represents a summary of the corresponding column of data in the main part of the window. Each of the fields that displays in this area are described below.

Total List Price

This is the list price from the BoM. It is the price in the BoM, without any changes applied in StrataVAR PQW.

VAR Total Cost

This is the total cost after discount that the VAR received from Cisco or from a Distributor (source). This is the cost that the VAR will actually pay.

Selected Quote Items

This option indicates the number of items controlled in the window.

Customer Total Price

This is the total price to be charged in this Quote to the customer.

VAR Total Profit

This is the customer's total price – the VAR total cost (the profit to the VAR before VIP).

Customer Discount

This is the average customer discount (**Cust Dsc (%)**) for all items in the Quote, which also takes into account the number of items in each.

VAR Discount

This is the average VAR discount (**VAR Dsc (%)**) for all items in the Quote, which also takes into account the number of items in each.

Total Profit + VIP

This is the total profit + the estimated VIP from this Quote.

Buttons

The green aggregation and summary area contains the following buttons –



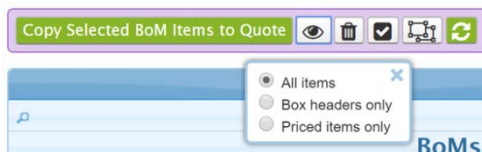
Untie/Tie – Enables you to make changes for specific items in a box.

[illegible]

Select All/Deselect All – Toggles to select/deselect all items in the Quote.



Filter BoM – Click this button to display a dropdown menu of filters that enables you to filter the list to display to show **All Items**, **Box Headers Only** or **Priced Items Only** (meaning that the price is not zero).



Save – Saves the Quote.



Trash – To remove BoMs, boxes or items from the Quote (which appeared on the right side of the window), select the relevant items in the left side of the window, and then click this button. The BoM itself is not affected, but these items will be removed from the Quote on the right side of the window. These items will still be shown on the left side of the window.



Set Discount Mode – Opens the following window in which you can change the discount calculation method.

Discount Calculation Mode

When changing a **Customer** field, affect **Margin** fields.

When changing a **VAR** field, affect **Margin** fields.

When changing a **Margin** field, affect **Customer** fields.

Cancel Save

PQW is set up so that editing specific fields in the Quote window, affects other types. For example, changing a **Customer** field can affect the **VAR** or the **Margin** fields in the Quote.

Discount Calculation Mode

When changing a **Customer** field, affect **VAR** fields.

When changing a **VAR** field, affect **Margin** fields.

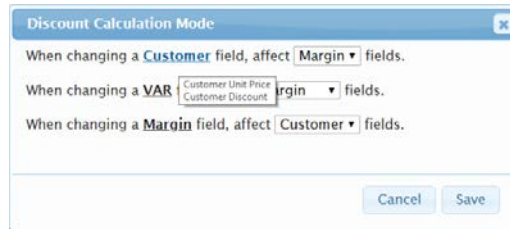
When changing a **Margin** field, affect **Customer** fields.

Cancel Save

For example, if you select **VAR** in the **Customer** field, it means that if you modify the customer discount, then that same type of modification is implemented on the VAR fields. This means that if you give the customer a discount, you transfer that discount to your cost, which means that you want to pay the supplier less while not affecting your profit margin.

Conversely, if you select **Margin** in the **Customer** field, it means that you increase the customer's unit price, which in turn affects the profit margin fields, but not the VAR fields, thus giving you more profit.

You can hover over the **Customer**, **VAR** and **Margin** links in this window to display a tooltip that shows the fields of that type, as shown below –



Discount Calculation Mode

When changing a **Customer** field, affect **Margin** fields.

When changing a **VAR** field, affect **Margin** fields.

When changing a **Margin** field, affect **Customer** fields.

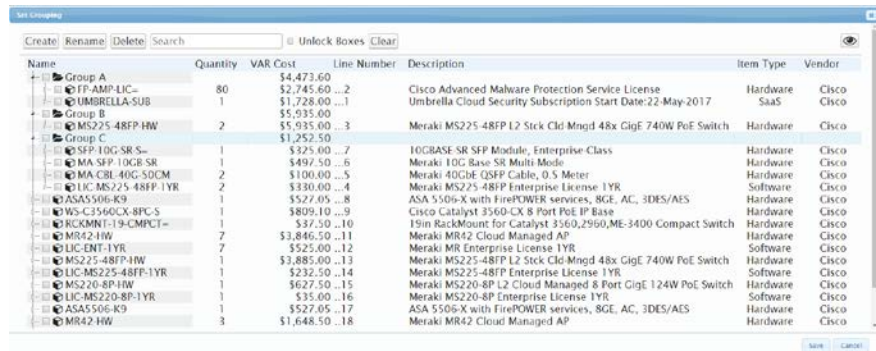
Cancel Save



Version Set Service Duration – Sets the service duration of the selected item(s). This is relevant for cases in which the duration affects the price. For example, for a software license/service/SaaS whose price is affected by the service duration.



Set Grouping – This button enables you to create groups in a quote. Click this button to open the following window –



Name	Quantity	VAR Cost	Line Number	Description	Item Type	Vendor
Group A						
AMP-LIC	80	\$2,745.60 ...2		Cisco Advanced Malware Protection Service License	Hardware	Cisco
UMBRELLA-SUB	1	\$1,728.00 ...1		Umbrella Cloud Security Subscription Start Date:22-May-2017	SaaS	Cisco
Group B						
MS225-48FP-HW	2	\$5,935.00 ...3		Meraki MS225-48FP L2 Stck Cld Mnagd 48x GlgE 740W PoE Switch	Hardware	Cisco
Group C						
SFP-10G-SR-S	1	\$325.00 ...7		10GBASE-SR SFP Module, Enterprise-Class	Hardware	Cisco
MA-SFP-10GB-SR	1	\$497.50 ...6		Meraki 10G Base SR Multi-Mode	Hardware	Cisco
MA-CBL-40G-50CM	2	\$100.00 ...5		Meraki 40GbE QSFP Cable, 0.5 Meter	Hardware	Cisco
LIC-MS225-48FP-1YR	2	\$330.00 ...4		Meraki MS225-48FP Enterprise License 1YR	Software	Cisco
ASA5506-K9	1	\$527.05 ...8		ASA 5506-X with FirePOWER services, 8GE, AC, 3DES/AES	Hardware	Cisco
WS-C3560CX-8PC-S	1	\$809.10 ...9		Cisco Catalyst 3560-CX 8 Port PoE IP Base	Hardware	Cisco
RCKMNT-19-CMPCT	1	\$37.50 ...10		19in RackMount for Catalyst 3560,2950,ME-3400 Compact Switch	Hardware	Cisco
MR42-HW	7	\$3,846.50 ...11		Meraki MR42 Cloud Managed AP	Hardware	Cisco
LIC-ENT-1YR	7	\$525.00 ...12		Meraki MR Enterprise License 1YR	Software	Cisco
MS225-48FP-HW	1	\$3,885.00 ...13		Meraki MS225-48FP L2 Stck Cld Mnagd 48x GlgE 740W PoE Switch	Hardware	Cisco
LIC-MS225-48FP-1YR	1	\$232.50 ...14		Meraki MR Enterprise License 1YR	Software	Cisco
MS220-8P-HW	1	\$627.50 ...15		Meraki MS220-8P L2 Cloud Managed 8 Port GlgE 124W PoE Switch	Hardware	Cisco
LIC-MS220-8P-1YR	1	\$35.00 ...16		Meraki MS220-8P Enterprise License 1YR	Software	Cisco
ASA5506-K9	1	\$527.05 ...17		ASA 5506-X with FirePOWER services, 8GE, AC, 3DES/AES	Hardware	Cisco
MR42-HW	3	\$1,648.50 ...18		Meraki MR42 Cloud Managed AP	Hardware	Cisco

You can use the **Create**, **Rename**, and **Delete** buttons to define groups.

To include an item in a group, simply drag and drop it into the group.

The window above shows three groups – named **Group A**, **Group B** and **Group C**., The rest of the items do not belong to any group.

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Exporting a Quote

This chapter describes how to export a customer-facing Quote in Excel.

6.1 Generating a Quote – Introduction

In the step, you export a customer-facing Quote for your customer in Excel.

StrataVAR PQW supports a variety of customer quoting templates that are defined as part of PQW deployment.

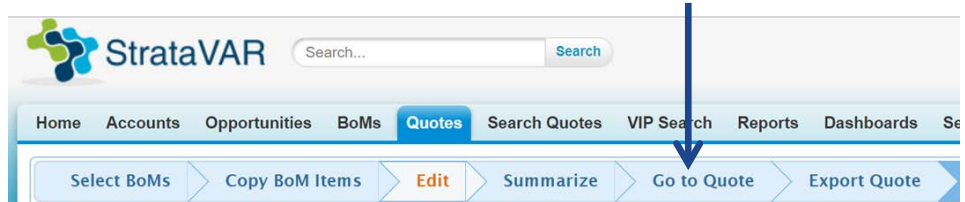
According to the definitions in each template, the exported Quote may contain your logo, brand colors, contractual business terms and special discounts for each customer. In addition, the items and item fields that are included/excluded to/from the external customer-facing Quote are determined by the PQW template that you select. For example, the template defines whether or not items with a zero price are included. The template can separate SaaS from other types of items. In addition, the branding of colors, sub-totals, groupings and so on is determined by the Edit Grids.

Note – People with expertise in Force.com programming and who have some StrataVAR PQW training can create additional quote templates, in addition to those provided by StrataVAR PQW.

6.2 Generating a Quote – How To

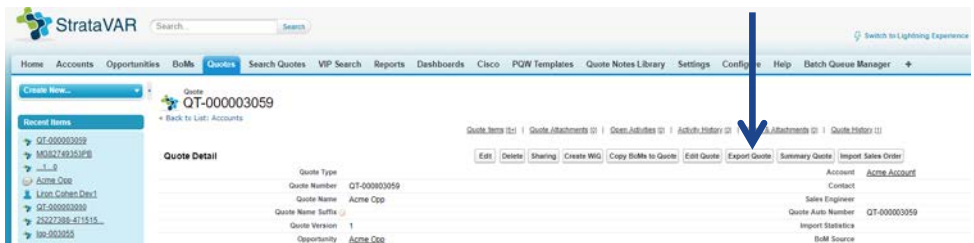
► To generate a customer-facing Quote –

- 1 Start generating a customer-facing Quote using one of the following options –
 - Select the **Quotes** tab and then click the **Go to Quote** tab, shown below –

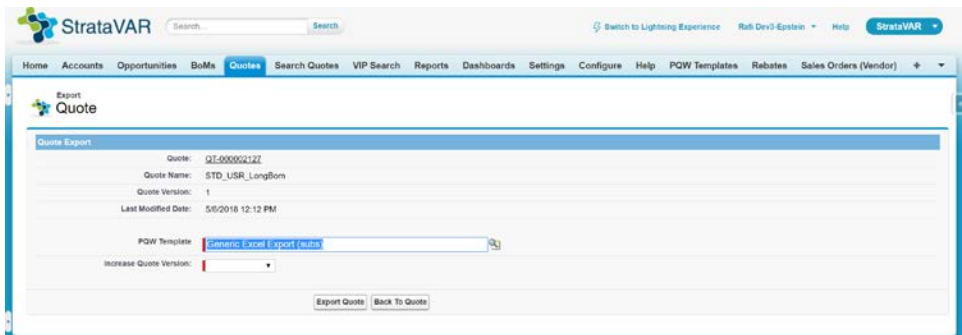



– OR –

- Select the **Quotes** tab and then click the **Export Quote** button, shown below –



In both cases, the following displays –



- 2 In the **PQW Template** field, leave the currently selected Quote's PQW template or click the  icon to select a different template. The template is empty the first time that the Quote is exported, and remembers the last selection.

- 3 In the **Quote Version** field, select **Yes** or **No** in order to specify whether the **Quote Version** field in the **Quote Detail** page (shown below) is automatically incremented.

The screenshot shows the StrataVAR interface with the 'Quote Detail' page for Quote QT-000003059. The 'Quote Version' field is highlighted in the 'Recent Items' list on the left and in the 'Quote Detail' form on the right. A blue arrow points from the 'Quote Version' field in the 'Recent Items' list to the 'Quote Version' field in the 'Quote Detail' form.

Quote Detail	Account
Quote Type	Account
Quote Number	QT-000003059
Quote Name	Acme Corp
Quote Name Suffix	
Quote Version	1
Opportunity	Acme Corp
Quote Special Note	
Customer Note 1	
Customer Note 2	
Customer Note 3	
Quote Status	
Price Deviation	
Purchase Order No	
Related Deal	
Step To Party	
Co-Term Date	
Begin Date	
End Date	
Summary Quote	
Associated Quote	
Total Quote Line Items	143

Note – Remember that the information that is included/excluded to/from the external customer-facing Quote (including this version number) is determined by the quote template that you selected, as described in page 93.

- 4 Click the **Export Quote** button. When the Quote is ready, the following is displayed –

The screenshot shows the StrataVAR interface with the 'Export Quote' page. The 'Quote Export Summary' section displays a message: 'The file was created and attached to the quote. [Click to download](#)'. Below the message is a 'Continue To Quote' button.

- 5 Click the **Click to Download** link or click the **Continue to Quote** button to see the Quote. The following is an example of a Quote –

Quote ID
QT-000002127
May 6, 2018

ACME Networks, Inc. Client: idan_test
Tax ID 3-102-484387 Contact:
215 End Ave. E-mail:
New York City, NYC 12280 Address:
UNITED STATES Phone:

Hardware & Services

Part No.	Description	Qty.	Unit Price	Total
CAB-AC-C6K-TWLK=	Power Cord, 250Vac 16A, twist lock NEMA L6-20 plug, US	11	\$31.50	\$346.50
	Subtotal			\$346.50
GLC-SX-MMD=	1000BASE-SX SFP transceiver module, MMF, RS232C, DDM	50	\$150.00	\$7,500.00

The generated Quote is stored as a related item of the Quote object in Salesforce in the **Quote Attachments** related lists, as shown below –

Edit Delete Sharing Create WQ Copy BoMs to Quote Edit Quote Export Quote Summary Quote Refresh Quote

Quote Items [New Quote Item](#)

Action	Quote Item Name	Part Number	Quantity	Total List Price	VAR Total Cost	VAR Discount %	Cust Extended Price	Cust Disc
Edit | Del	QTITM-000157824	CON-SNTP-7X9B2P2	1	\$15,755.00	\$10,240.75	35.00	\$15,755.00	
Edit | Del	QTITM-000157825	CON-SNTP-7X9B2P2	1	\$0.00	\$0.00	0.00	\$0.00	
Edit | Del	QTITM-000157826	CON-SNTP-7X9B2P2	1	\$0.00	\$0.00	0.00	\$0.00	
Edit | Del	QTITM-000157827	CON-SNTP-7X9B2P2	1	\$0.00	\$0.00	0.00	\$0.00	
Edit | Del	QTITM-000157828	CON-SNTP-7X9B2P2	1	\$0.00	\$0.00	0.00	\$0.00	

[Show 5 more >](#) | [Go to list \(50+\) >](#)

Quote Attachments

Action	Quote Attachment Name	Last Status	Active	Record Type	Download	
Edit Del	QT-000002448-1 (test 1 2018-06-04).xlsx	Export	✓	Excel Quote	Click to Download	6/

Open Activities [New Task](#) [New Event](#)

No records to display



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StrataVAR

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Phone – Call toll free from our website.
www.StrataVAR.com
