



# StrataVAR

## StrataVAR PQW (Partner Quoting Workspace) User Guide



**Version 2**

# 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 39, describes how to import quotes from supplier sources into StrataVAR PQW, which are then called BoMs.
- **Chapter 4, Assembling a Quote**, page 69, 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 111, 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 125, describes how to export a customized customer-facing quote in Excel.
- **Chapter 7, Refresh Options**, page 131, describes the various refresh options available in StrataVAR.

## 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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# Important Notice

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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**.

### 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** 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.

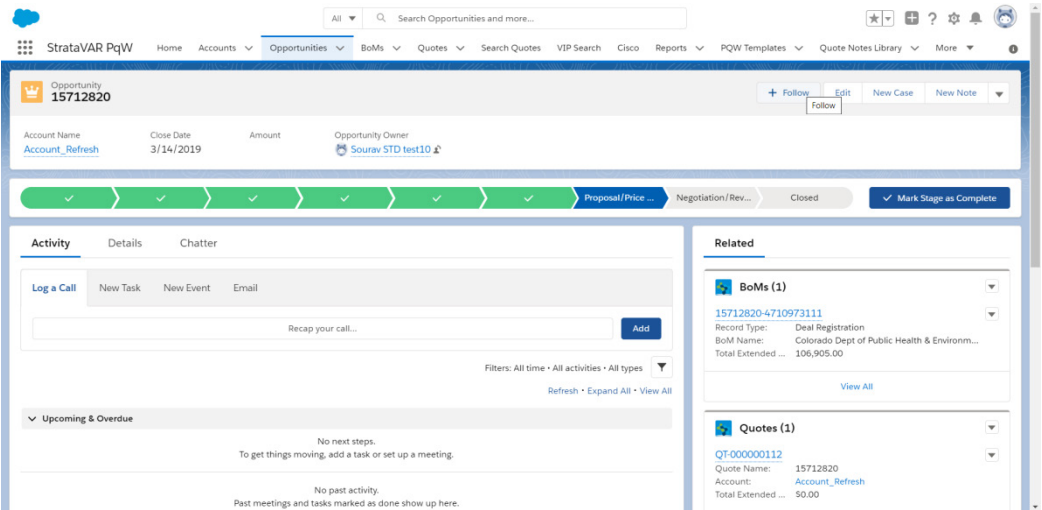
### Salesforce Opportunities – Current Salesforce Users

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.

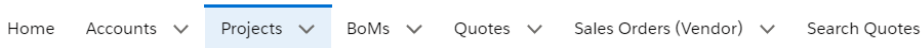


Each Salesforce **Opportunities** tab shows the related lists of its BoMs and Quotes. For example, as shown below –



### 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 –

The screenshot displays the Salesforce interface for the 'Projects' tab, specifically for the 'Akash Test Account'. The top navigation bar includes 'StrataVAR PqW', 'Home', 'Accounts', 'Projects', 'BoMs', 'Quotes', 'Sales Orders (Vendor)', 'Search Quotes', 'VIP Search', 'Reports', 'Dashboards', 'Cisco', and 'More'. The main content area is divided into two sections: 'Related' and 'Activity'.

**Related Section:**

- BoMs (1):** A table with columns: BOM NUMBER, RECORD TYPE, BOM NAME, and TOTAL EXTENDED LIST PRICE. It contains one entry: BOM NUMBER 04346258\_Rev3, RECORD TYPE Distri BoM, BOM NAME 04346258\_Rev3, and TOTAL EXTENDED LIST PRICE 5,001.50. A 'View All' link is present below the table.
- Quotes (6+):** A table with columns: QUOTE NUMBER, QUOTE NAME, ACCOUNT, and TOTAL EXTENDED LIST PRICE. It contains six entries, all with 'Akash Test Account' as the account and varying quote numbers and prices.

**Activity Section:**

- New Event:** A button to create a new event, with a sub-section for 'New Task', 'Log a Call', and 'Email'. A text input field 'Set up an event...' and an 'Add' button are shown.
- Filters:** A dropdown menu showing 'All time', 'All activities', and 'All types'.
- Upcoming & Overdue:** A section with a 'No next steps' message and a 'To get things moving, add a task or set up a meeting.' prompt. Below this, a 'No past activity' message states 'Past meetings and tasks marked as done show up here.'

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 –

StrataVAR PqW

HomeAccountsOpportunitiesBoMsQuotesSearch QuotesVIP SearchCiscoReportsPQW TemplatesDiscover CompaniesMore

Account

Dor account

Follow

Edit

New Contact

New Case

RelatedDetailsNews

We found no potential duplicates of this account.

Contacts (0)

New

Opportunities (2)

New

sharon

Stage:Prospecting

Amount:

Close Date:5/26/2019

Dor test

Stage:Prospecting

Amount:

Close Date:3/30/2019

View All

Quotes (6+)

QUOTE NUMBER	QUOTE NAME	OPPORTUNITY	TOTAL EXTENDED LIST PRICE
<a href="#">Disti quote</a>	Dor test	<a href="#">Dor test</a>	\$1,617,771.00
<a href="#">QT-000000125</a>	Dor test	<a href="#">Dor test</a>	\$1,617,771.00
<a href="#">QT-000000126</a>	Dor test	<a href="#">Dor test</a>	\$1,617,771.00

ActivityChatter

New Task

New Event

Log a Call

Email

Create a task...

Add

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

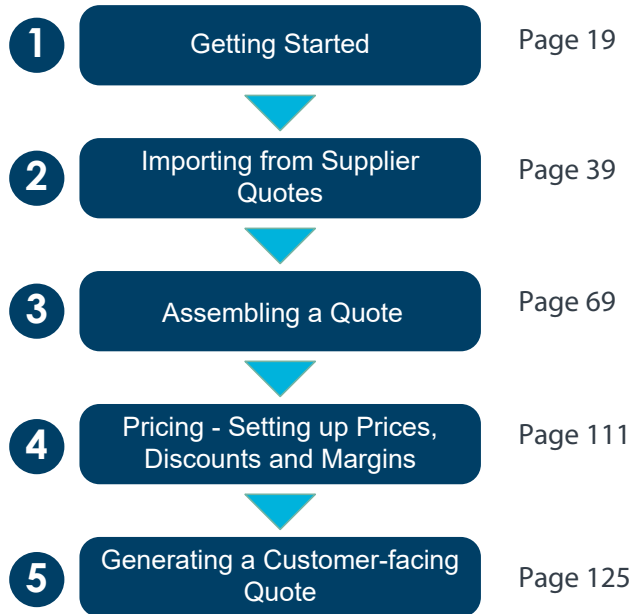
No next steps.

To get things moving, add a task or set up a meeting.

No past activity.

Past meetings and tasks marked as done show up here.

## 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 23
- **Select an Account**, page 23
- **Create an Opportunity or Project**, page 23
- **Select an Opportunity or Project**, page 24
- **Filter Tables in PQW Grids**, page 30
- **Apply Operators to a Table Filter**, page 31
- **Clear a Table Filter**, page 31
- **Import a Source**, page 42
- **Define the BoM Type**, page 44
- **Merge a Disti Quote**, page 54
- **Define a Reusable BoM**, page 59
- **Handle a Maintenance BoM**, page 59
- **Define a Maintenance BoM**, page 60
- **Define Quote Aggregation**, page 61
- **Create a Quote Container**, page 70
- **Create a Quote**, page 72
- **Define a Quote**, page 72
- **Use the Quote Notes Library**, page 78
- **List BoMs for Selection**, page 90
- **Filter the BoMs List**, page 92
- **Select the BoMs to Be Included in a Quote**, page 92
- **Copy Items into a Quote**, page 93
- **Select the BoM Items to Be Copied into a Quote**, page 93
- **Specify the Quantity of the BoM Boxes/Items**, page 96
- **Edit a Quote**, page 98
- **Define the Pricing Operation**, page 114
- **Adjust the Pricing of Specific Items**, page 117
- **Apply a Markup to a Quote**, page 118
- **Generate a Quote**, page 126
- **Switch to Lightning Mode**, page 22
- **Switch to Classic Mode**, page 22
- **Perform a VIP Search**, page 34

- **Calculate VIP Payout**, page 76
- **Set the VIP Effective Date**, page 76
- **Perform a VIP Recalculation**, page 84
- **Create a New Quote Version**, page 87
- **Clone a Quote**, page 87
- **Create a Summary Quote Automatically**, page 103
- **Create a Summary Quote Manually**, page 105
- **Refresh a Summary Quote**, page 109
- **Refresh Options**, page 131

## 1.4.2 What Does This Do?

- **Attach Disti Button**, page 55
- **Attach File to BoM Button**, page 56
- **Continue to BoM Button**, page 47
- **Continue to Quote Button**, page 128
- **Copy BoMs to Quote Button**, page x
- **Create BoM**, page 42
- **Create New Quote Button**, page 71
- **Create a New Quote Version Button**, page 87
- **Edit Button**, page 42
- **Edit Quote Button**, page 98
- **Export to Excel Button**, page 58
- **Export Quote Button**, page 128
- **Filter BoM Button**, page 121
- **Go Button**, page 33
- **Import Another BoM Button**, page 49
- **Import BoM Button**, page 42
- **Import Sales Order Button**, page 80
- **List Applications**, page 20
- **Moving Between Modes**, page 21
- **New Opportunity Button**, page 26
- **New Project Button**, page 26
- **New Quote Button**, page 71
- **Open BoM CCW Button**, page 52
- **Quick Add to Quote Button**, page 93
- **Refresh BoM Button**, page 53
- **Refresh Quote Button**, page 131
- **Save as New Quote Button**, page 87
- **Search Box**, page 50

- **Set Discount Mode Button**, page 122
- **Set Grouping Button**, page 123
- **Summary Quote Button**, page 100
- **Tie/Untie Button**, page 121
- **Update Selected Items Button**, page 116
- **Version Set Service Duration**, page 123
- **View All Button**, page 57
- **View Errors Button**, page 57
- **VIP Recalc Button**, page 84



# 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

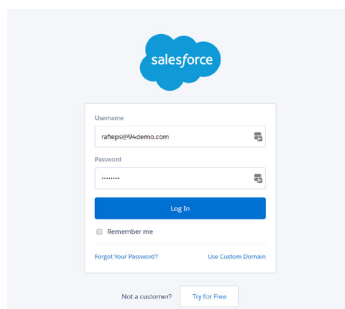
The following describes how to get up and running using StrataVAR PQW. If assistance is required, you may contact support at [help@StrataVAR.com](mailto:help@StrataVAR.com).

### 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 –

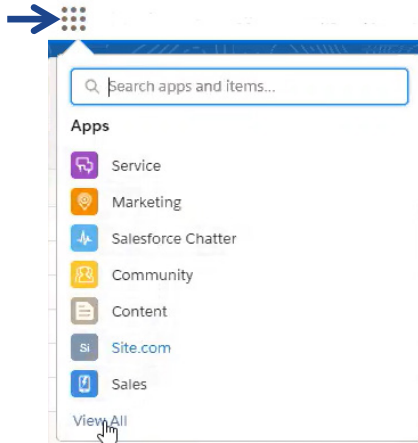
- 1 For current Salesforce users (using the Salesforce StrataVAR PQW Extension), log into Salesforce.com using your usual username and password.  
– OR –  
For non-Salesforce users (using the Embedded Force.com version), log into the following page using the credentials provided to you by StrataVAR –



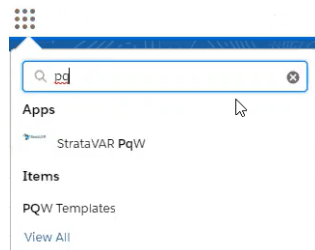
- 2 Only existing Salesforce users (using this StrataVAR PQW Extension) must perform this step in order to add the strata VAR features to the user interface.

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

Click the  icon at the top left of the window to access the list of applications available in Lightning mode.

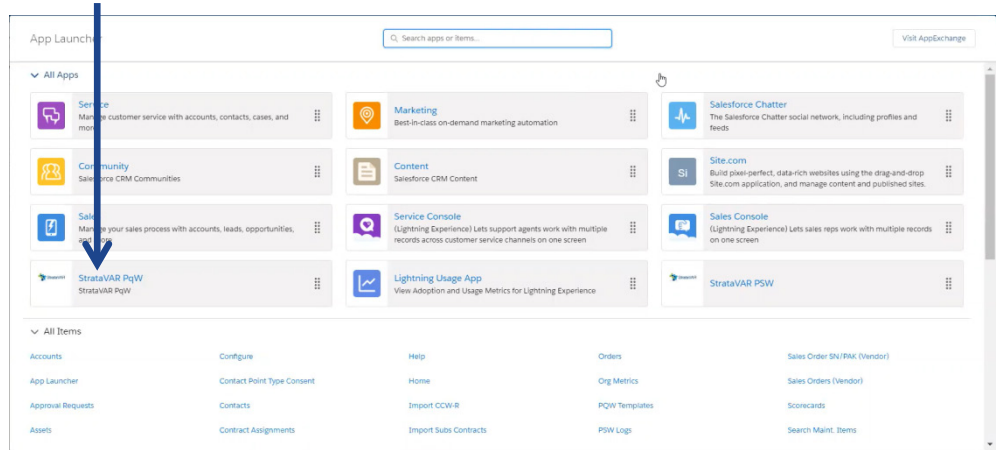


Select the StrataVAR PQW application if it is visible in the list. If you do not see it, type pq or pqw in the **Search** box at the top of the pane, as shown below. The list of applications then shows all applications that match your search criterion. Click **StrataVAR PQW** in the list to launch the application.




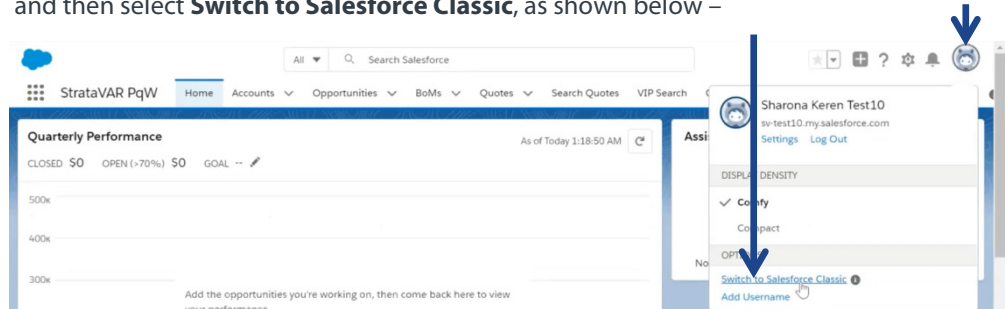


Alternatively, you can click the **View All** link to display the list of all available applications, as shown below. Then, click the **StrataVAR PqW** application to launch the application in Lightning mode.

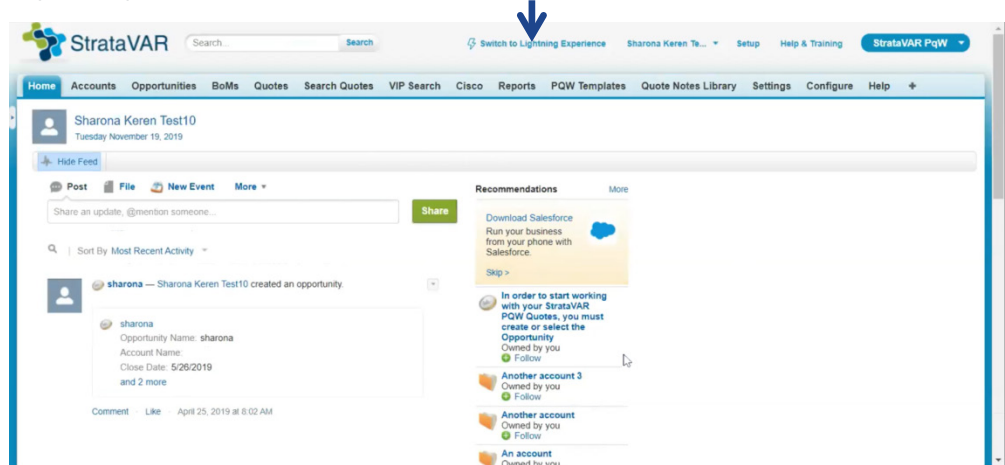


**Note** – The StrataVAR PQW application is accessible in two modes – Classic mode and Lightning mode (V2 and beyond). The StrataVAR PQW application user interface, features and functionality described in this V2.0 manual relate to Lightning mode. The user interface for Classic mode is described in the *StrataVAR PQW User Guide V1.0*. The two modes are similar and contain the same features and functionality. However, the user interface appears differently for the two modes.

**Note** – You can move between Classic mode and Lightning mode, as needed. To move from Lightning mode to Classic mode, click the  icon at the top right of the window and then select **Switch to Salesforce Classic**, as shown below –

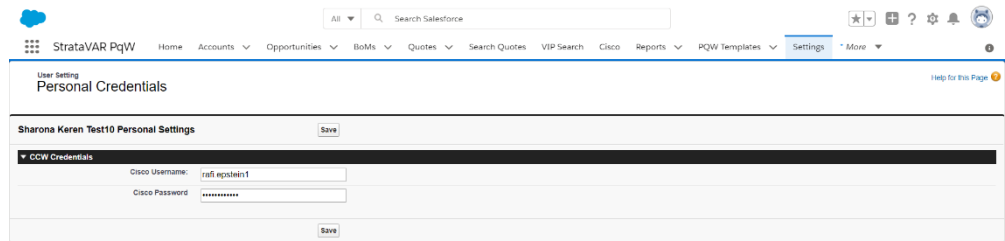


To move from Classic mode to Lightning mode, click the **Switch to Lightning Experience** button at the top of the window below. You can switch between modes at any time by clicking the **Switch to Salesforce Classic** and **Switch to Lightning Experience** links available at the top of the window.



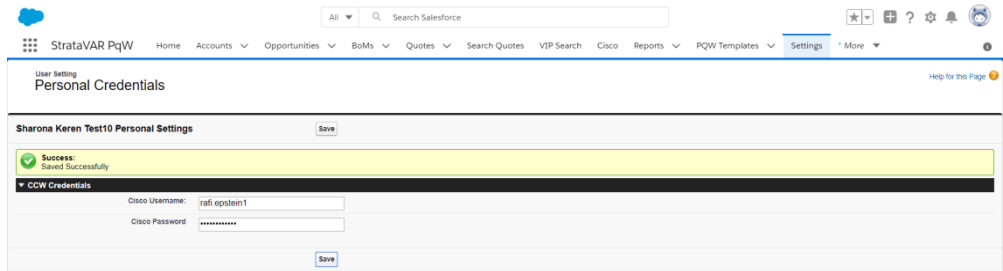
- 3 From now on all steps are the same for both types of users.

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.



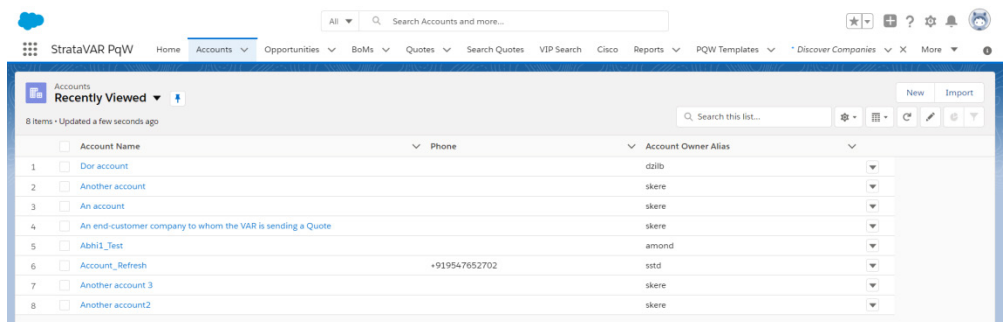
***Congratulations. You are up and running!***

## 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 –



You can click an Account name to select it.

- 2 Click the **New** button at the top right of the window. The following displays –

The screenshot shows a 'New Account' form with two main sections: 'Account Information' and 'Additional Information'. The 'Account Information' section includes fields for 'Account Owner' (pre-filled with 'Sharona Keren Test10'), 'Phone', 'Account Name' (marked with an asterisk), 'Fax', 'Parent Account' (with a search dropdown), and 'Website'. The 'Additional Information' section includes 'Type' and 'Industry' (both dropdown menus with '--None--' selected), 'Employees', 'Annual Revenue', and a 'Description' text area. At the bottom right, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

**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** section, as shown below –

The screenshot displays the StrataVAR PqW web application interface. The top navigation bar includes the StrataVAR PqW logo, a search bar, and various menu items like Home, Accounts, Opportunities, BoMs, Quotes, Search Quotes, VIP Search, Cisco, Reports, PqW Templates, Settings, and More. The main content area is titled 'Account Dor account'. It features a sidebar with 'Contacts (0)' and 'Opportunities (2)'. The 'Opportunities' section is highlighted with a blue arrow. Below this, there is a table of opportunities for the account 'Dor test'. The table has columns for 'QUOTE NUMBER', 'QUOTE NAME', 'OPPORTUNITY', and 'TOTAL EXTENDED LIST PRICE'. The table lists six opportunities, all with a 'Dor test' opportunity and a total price of \$1,617,771.00. On the right side of the interface, there is a 'Create a task...' section with a search bar and an 'Add' button. Below this is a 'Filters' section with 'All time', 'All activities', and 'All types' selected. The 'Upcoming & Overdue' section shows 'No next steps' and 'No past activity'.

StrataVAR PqW

Search Accounts and more...

Accounts Opportunities BoMs Quotes Search Quotes VIP Search Cisco Reports PqW Templates Settings More

Account Dor account

+ Follow Edit New Contact New Case

Contacts (0) New

Opportunities (2) New

sharona Opportunities Dor test Prospecting

Stage: Prospecting Amount: Close Date: 5/26/2019

View All

Quotes (6+)

QUOTE NUMBER	QUOTE NAME	OPPORTUNITY	TOTAL EXTENDED LIST PRICE
Disti quote	Dor test	Dor test	\$1,617,771.00
QT-000000125	Dor test	Dor test	\$1,617,771.00
QT-000000126	Dor test	Dor test	\$1,617,771.00
QT-000000127	Dor test	Dor test	\$1,617,439.00
QT-000000129	Dor test	Dor test	\$1,617,771.00
QT-000000129	Dor test	Dor test	\$1,617,771.00

Create a task... Add

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No next steps.  
To get things moving, add a task or set up a meeting.

No past activity.  
Past meetings and tasks marked as done show up here.

- 4 Click the **New** button at the far right of the Opportunities section. The following displays –

New Opportunity

Opportunity Information

Opportunity Owner  
Sharona Keren Test10

\* Opportunity Name

\* Account Name

Type

Primary Campaign Source

\* Close Date

\* Stage

Probability (%)

Amount

Additional Information

Lead Source

Next Step

Cancel

Save & New

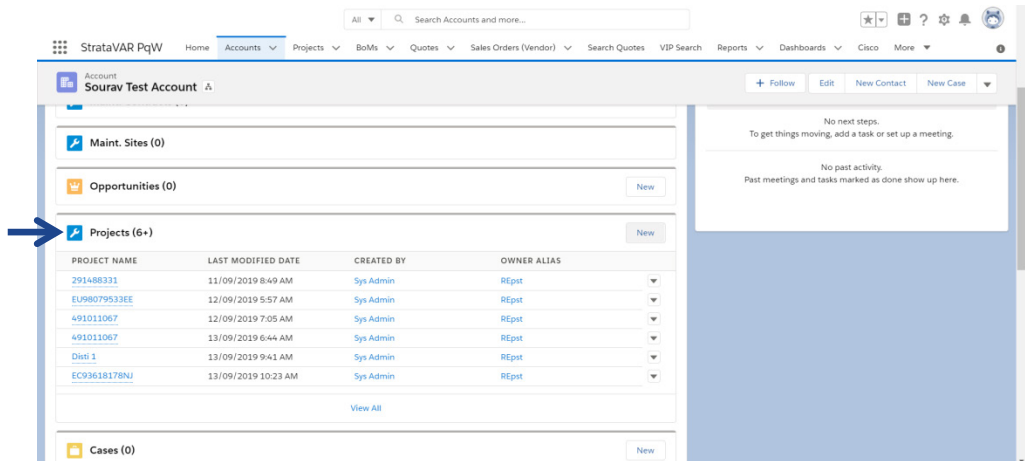
Save

Mandatory fields are indicated by a red asterisk (\*).

- 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** section, as shown below –



- 4 Click the **New** button at the far right of the Projects section. The following displays –

New Project

Information

\* Project Name

\* Account

Owner  
Sys Admin

Cancel Save & New Save

- 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.

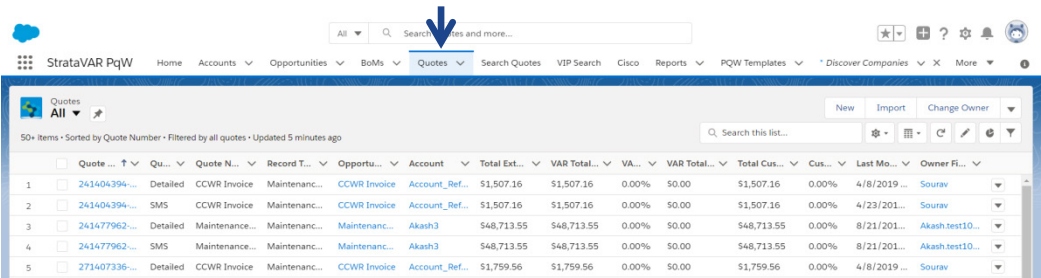
All StrataVAR PQW users have an **Account** and a **Contact** tab, in addition to the **BoMs** and **Quotes** PQW tabs.

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.

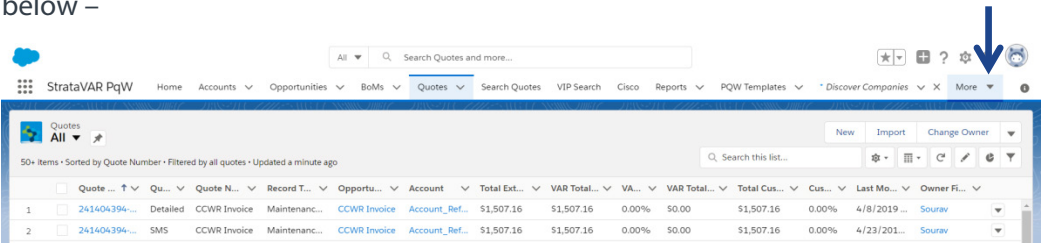
## 2.2.1 StrataVAR PQW Tabs

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 –



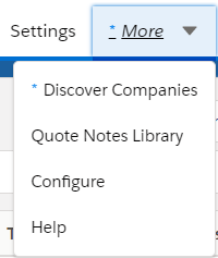
Selecting a tab displays the relevant page underneath and enables access to the functionality associated with it.

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 –



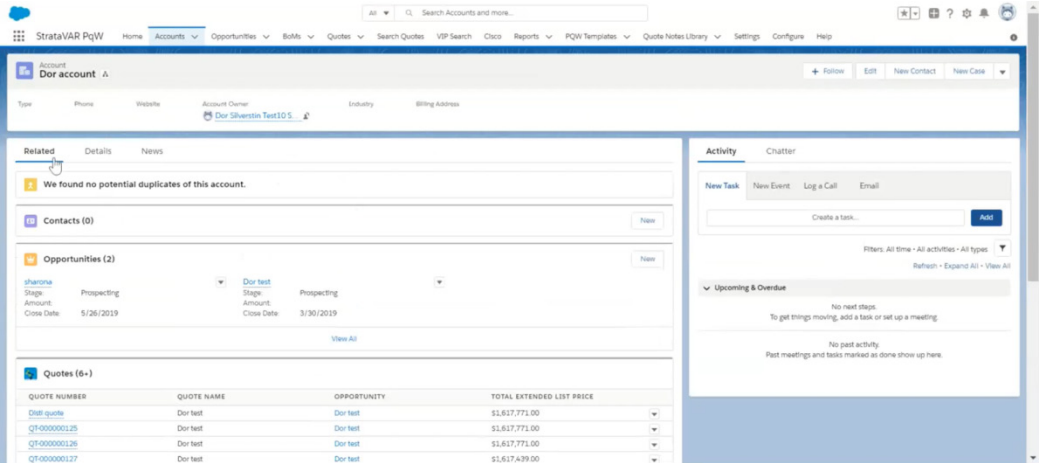


Clicking this down arrow opens a dropdown menu of additional tab options. Simply click an option in the dropdown menu to display its page. For example, as shown below –

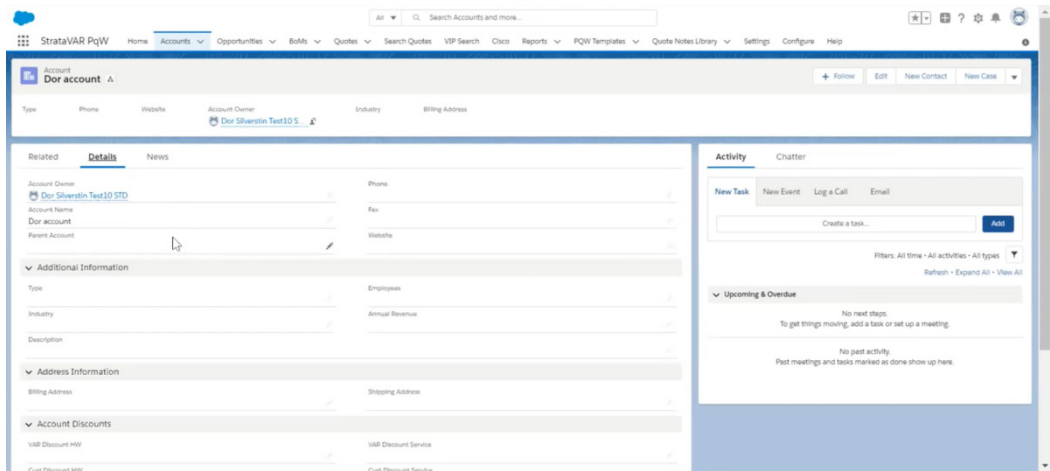


### 2.2.2 StrataVAR PqW Subtabs

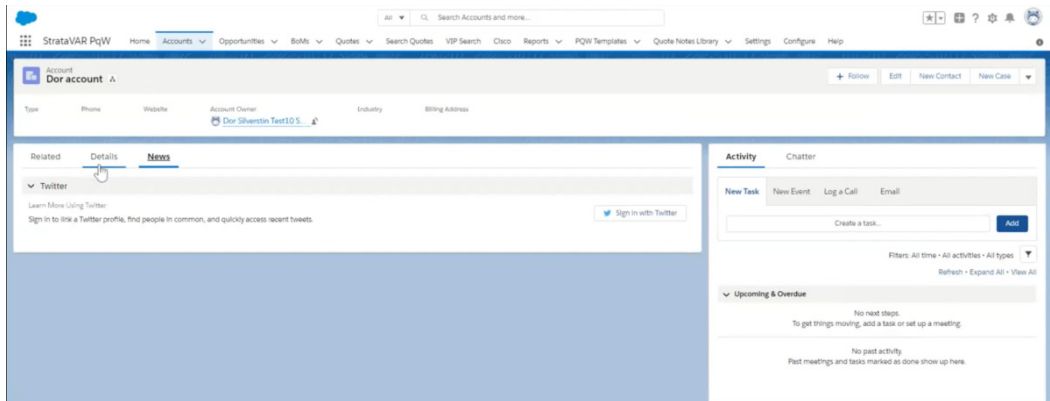
Many windows in StrataVAR PqW display information in multiple subtabs. These subtabs present various types information for the item in a convenient, easy-to-use view. For example, the following shows three subtabs for the DOR account in the Accounts window. These subtabs include the **Related**, **Details** and **News** subtabs, as shown below –



DOR Account – Related Subtab



## DOR Account – Details Subtab



## DOR Account – News Subtab

### 2.2.3 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.

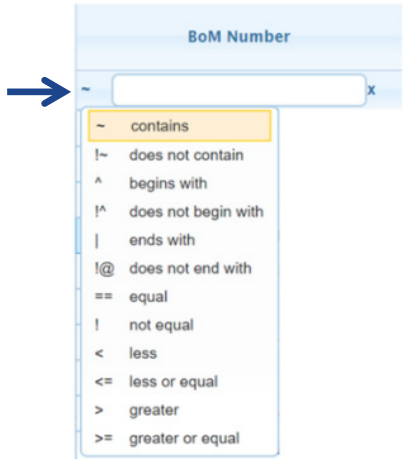


Entering text into each of the filter column fields automatically filters the rows displayed in the table.

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.

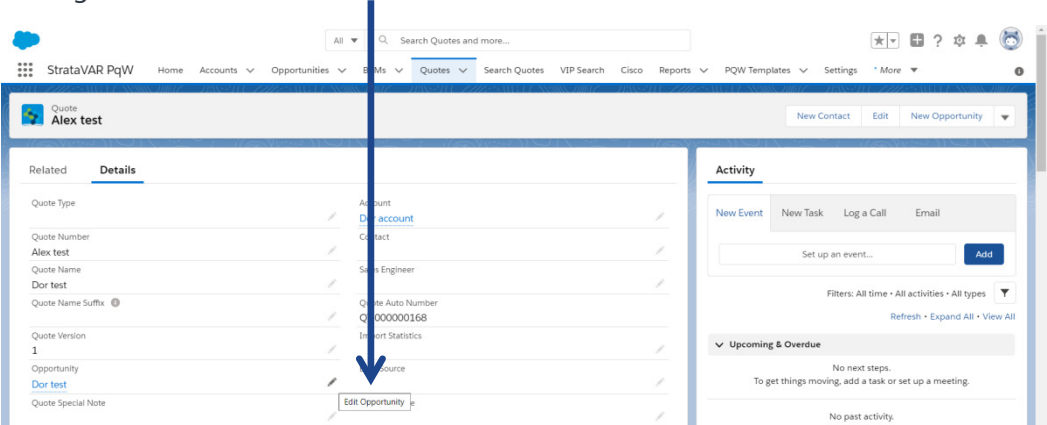


## 2.2.4 Object Relationships

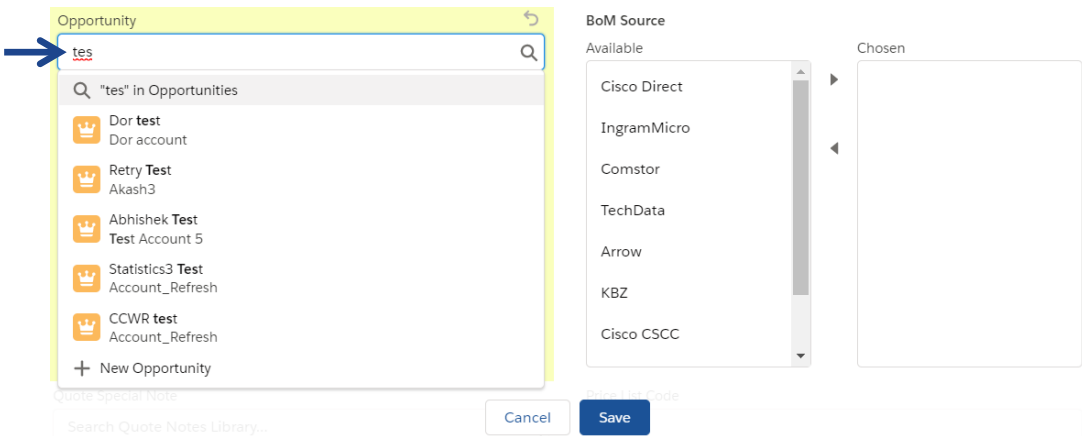
In PQW, relationships are created between objects that link the objects with each other so that when a user views a specific object, they can also see related data.

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.



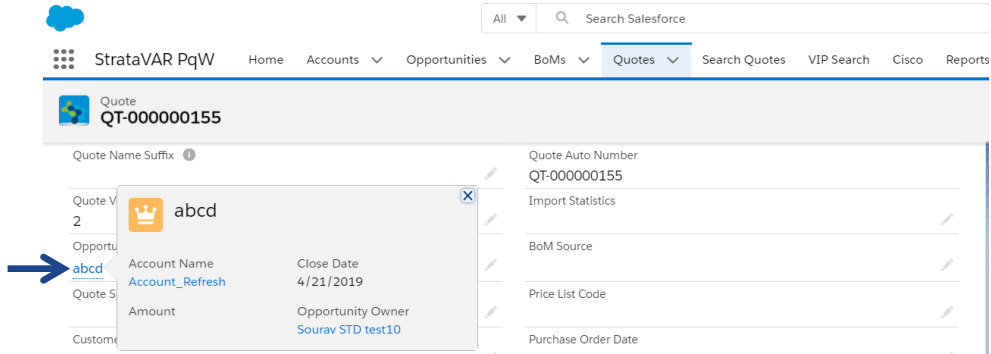
Clicking anywhere in the **Opportunity** field opens an Edit window. This window displays a lookup list for the **Opportunity** field in which you can select one of the existing related objects (such as an **Opportunity**). For example –



The search field (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.

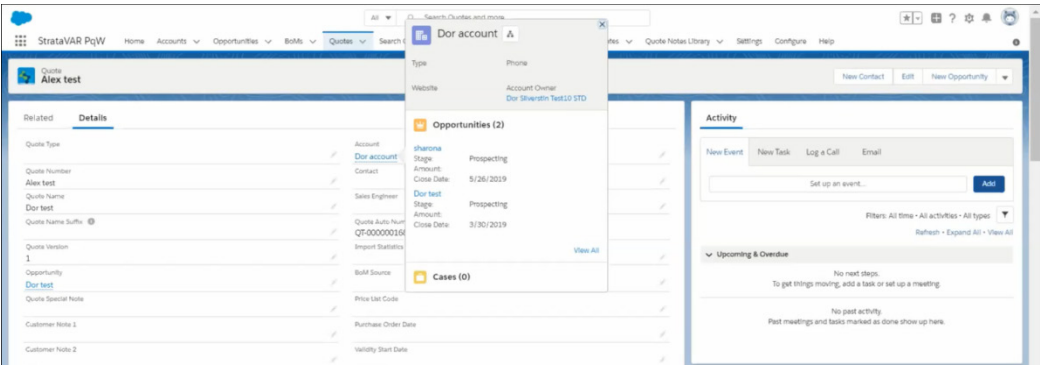
StrataVAR PQW makes sure to only offer a selection of objects that you are allowed to pick.

If a value has already been selected for a field (for example, as shown below), then you can display that selected object by clicking anywhere in the field. For example, the window below displays the value for the **Opportunity Name** field.



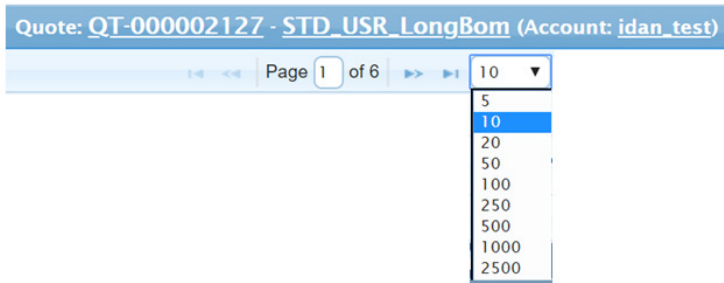
## 2.2.5 Viewing Field Values

You can hover over many of the fields in StrataVAR PQW to view additional details for that entry. For example, the following shows additional details when hovering over the **Account** field in the Quotes window –



## 2.2.6 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 –



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.

## 2.2.7 VIP Search

The **VIP Search** tab enables you to search for a product in order to view the discount (rebate) to be received from Cisco for it. Cisco’s Value Incentive Program (VIP) is a comprehensive backend incentive program designed to increase margins for Cisco channel partners. The program provides a reward to partners that achieve program objectives during either a six-month program period or a three-month program period. The VIP determines the discount that the customer will receive from Cisco for a given product.

For a VIP search, all the fields in the **VIP Search** tab (see below) are optional search criteria that filter the displayed results.

**Note** – The VIP version to be used for VIP calculations must be configured in advance. For more details, see [Configuring VIP](#).

You can filter using the following search criteria –

- VIP Product Search –
  - Version
  - Product
  - Description
  - Track
  - Subtrack
  - Eligibility
  - Product Family
  - Company
- VIP Payout Calculation Parameters
  - Quantity
  - Discount Percent
  - Limit Results To

After specifying your search criteria, click the **Search** button in the window. The table at the bottom of the window shows the matching search results.

Product Identifier	Product Family	Description	Track	Sub Track	Category	Vip Version	Price	Payout%	Increment %	\$ Allocation %	Payout \$	Is Transition
MR33-HW	CNWR	Meraki MR33 Cloud Managed AP	VIP ARCHITECTURE	MERAKI	I	VIP35	649	2		1.0	100	19

# Configuring VIP

The VIP version must be configured before performing VIP calculations.

► **To configure VIP –**

- 1 In the Quote **Details** tab, select **Configure** in the dropdown menu at the top right. The **Configure** tab displays, as shown below –

Organization Setting

PQA1 Configuration - Step 1 of 3

Next

General Settings

VAR Discounts

Hardware Default Discount: 0.0

SaaS Default Discount: 0.0

Software Default Discount: 0.0

Service Default Discount: 0.0

Shared Services (Partner Shared Support non-renewal): 0.0

Service Renewal (SMARTnet renewal): 0.0

Shared Services Renewal (Partner Shared Support renewal): 0.0

Customer Discounts

Hardware Default Discount: 10.0

SaaS Default Discount: 10.0

Software Default Discount: 10.0

Service Default Discount: 10.0

Shared Services (Partner Shared Support non-renewal): 10.0

- 2 Click the **Next** button at the top of the window. The following displays. VIP settings are configured in Step 2 of PQA1 configuration.

Organization Setting

PQA1 Configuration - Step 2 of 3

Previous Next Save

VIP Settings

Version: VIP35 | Valid Until 2020-07-25

Version	Track	Sub Track
VIP35	VIP ARCHITECTURE	COLLABORATION
VIP35	VIP ARCHITECTURE	DATA CENTER
VIP35	VIP ARCHITECTURE	ENTERPRISE NETWORKS
VIP35	VIP ARCHITECTURE	MERAKI
VIP35	VIP ARCHITECTURE	SECURITY
VIP35	VIP ARCHITECTURE	SERVICE PROVIDER TECHNOLOGY
VIP35	VIP ANNUITY	ENTERPRISE NETWORKS ANNUITY
VIP35	VIP ANNUITY	COLLABORATION ANNUITY
VIP35	VIP ANNUITY	SECURITY ANNUITY
VIP35	VIP ANNUITY	DATA CENTER ANNUITY

Previous Next Save



Each row in the table in this window represents a different VIP version-track-subtrack combination. For example, VIP35 has two different tracks – Architecture and Annuity. The Architecture track has multiple subtracks – Collaboration, Data Center, enterprise Networks and Meraki, Security and Service Provider Technology.

- 3 In the **Version** dropdown list, select the relevant VIP version. Each VIP version is valid for a defined period time (usually three or six months). You should select the VIP version that is valid for the period of time in which you are interested. For example, if you are interested in calculating the VIP rebate for March 20, 2020, select VIP 35, which is valid from January 25, 2020 through July 24, 2020.

PQW QA1 Configuration - Step 2 of 3

Previous

Next

Save

VIP Settings

Version:

VIP35 | Valid Until 2020-07-25

VIP35 | Valid Until 2020-07-25

VIP32 | Valid Until 2019-01-26

VIP33 | Valid Until 2019-07-27

VIP34 | Valid Until 2020-01-25

☐

Version

Track

- 4 Click the **Next** button at the top of the window. This window shows the incremental percentage that Cisco rebates to a customer for each VIP version-track-subtrack combination (row) shown in Step 2 of the window. The **Incremental** column value is used to calculate the **Item Payout Rebate** amount for VIP, as described on page 76.

PQW QA1 Configuration - Step 3 of 3

Previous

Save

VIP Incremental Setting

<input type="checkbox"/>	Version	Track	Sub Track	Certification	Incremental
<input checked="" type="checkbox"/>	VIP35	VIP ARCHITECTURE	COLLABORATION	Gold/CMSP Master	1.0
<input checked="" type="checkbox"/>	VIP35	VIP ARCHITECTURE	COLLABORATION	Master Specialization/Cisco Powered Incentive	2.0
<input checked="" type="checkbox"/>	VIP35	VIP ARCHITECTURE	DATA CENTER	Gold/CMSP Master	1.0
<input checked="" type="checkbox"/>	VIP35	VIP ARCHITECTURE	DATA CENTER	Master Specialization/Cisco Powered Incentive	1.0
<input checked="" type="checkbox"/>	VIP35	VIP ARCHITECTURE	ENTERPRISE NETWORKS	Gold/CMSP Master	1.0
<input checked="" type="checkbox"/>	VIP35	VIP ARCHITECTURE	ENTERPRISE NETWORKS	Master Specialization/Cisco Powered Incentive	1.0
<input checked="" type="checkbox"/>	VIP35	VIP ARCHITECTURE	MERAKI	Gold/CMSP Master	1.0
<input checked="" type="checkbox"/>	VIP35	VIP ARCHITECTURE	SECURITY	Gold/CMSP Master	1.0
<input checked="" type="checkbox"/>	VIP35	VIP ARCHITECTURE	SECURITY	Master Specialization/Cisco Powered Incentive	2.0
<input checked="" type="checkbox"/>	VIP35	VIP ARCHITECTURE	SERVICE PROVIDER TECHNOLOGY	Master Specialization/Cisco Powered Incentive	1.0

Previous

Save

- 5 Select the checkbox of each VIP version-track-subtrack combination row to be used when making VIP calculations. If a checkbox is unchecked (inactive/not valid), VIP calculations based on that specific version-track-subtrack combination will fail.

PQW QA1 Configuration - Step 2 of 3

Previous Next Save

VIP Settings

Version: VIP35 | Valid Until 2020-07-25

	Version	Track	Sub Track
<input checked="" type="checkbox"/>	VIP35	VIP ARCHITECTURE	COLLABORATION
<input checked="" type="checkbox"/>	VIP35	VIP ARCHITECTURE	DATA CENTER
<input checked="" type="checkbox"/>	VIP35	VIP ARCHITECTURE	ENTERPRISE NETWORKS
<input type="checkbox"/>	VIP35	VIP ARCHITECTURE	MERAKI
<input checked="" type="checkbox"/>	VIP35	VIP ARCHITECTURE	SECURITY
<input checked="" type="checkbox"/>	VIP35	VIP ARCHITECTURE	SERVICE PROVIDER TECHNOLOGY
<input checked="" type="checkbox"/>	VIP35	VIP ANNUITY	ENTERPRISE NETWORKS ANNUITY
<input checked="" type="checkbox"/>	VIP35	VIP ANNUITY	COLLABORATION ANNUITY
<input checked="" type="checkbox"/>	VIP35	VIP ANNUITY	SECURITY ANNUITY
<input checked="" type="checkbox"/>	VIP35	VIP ANNUITY	DATA CENTER ANNUITY

Previous Next Save

- 6 Click the **Save** button.



# 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 beginning with the [CCW-R Invoice](#) section.

## 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

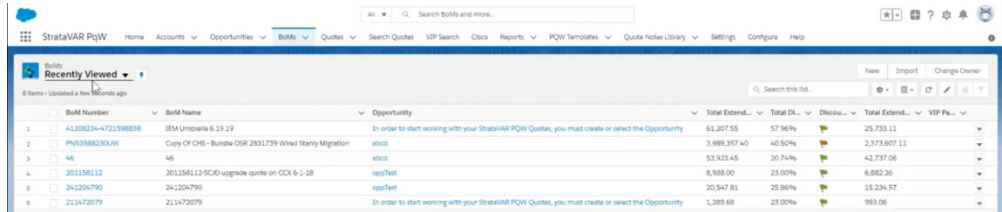
After a supplier source has been imported into StrataVAR PQW and becomes a BoM, it is not modified automatically by StrataVAR PQW, regardless of whether some or all of its items are added to a Quote in StrataVAR PQW.

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.

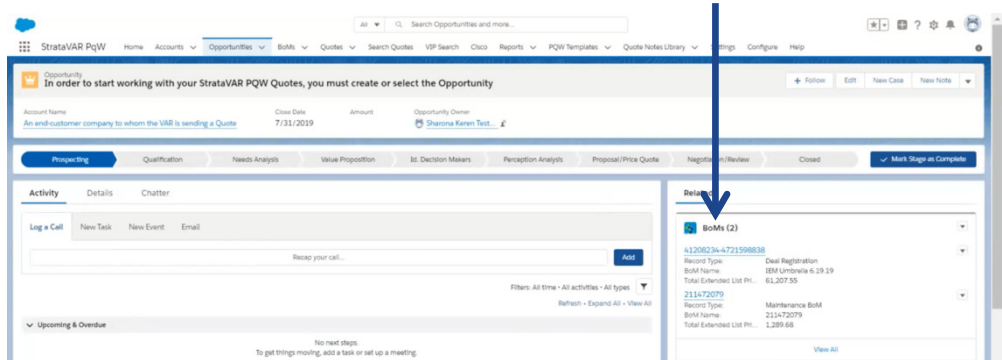


The screenshot shows the 'Recently Viewed' tab in the StrataVAR PQW interface. It displays a table with columns: Build Number, Build Name, Opportunity, Total Extended, Total DL, Disc, Total Extended, and VIP Pk. The table lists several BoMs, including one with Build Number 41208234-472159838 and Build Name IEM Umbrella 6.19.19.

Build Number	Build Name	Opportunity	Total Extended	Total DL	Disc	Total Extended	VIP Pk
41208234-472159838	IEM Umbrella 6.19.19	In order to start working with your StrataVAR PQW Quotes, you must create or select the Opportunity	61,207.55	57.96%		25,733.11	
Ph03598230JW	Copy Of CHS - Bundle OGR 2831739 Wind Starty Migration	about	3,989,357.40	40.50%		2,373,607.11	
46	46	about	53,923.45	20.74%		42,737.06	
201158112	201158112-SCID upgrade quote on CCX 6-1-18	appTest	8,968.00	23.00%		6,862.26	
241204790	241204790	appTest	20,547.81	26.86%		15,224.57	
211472079	211472079	In order to start working with your StrataVAR PQW Quotes, you must create or select the Opportunity	1,289.68	23.00%		993.06	

– OR –

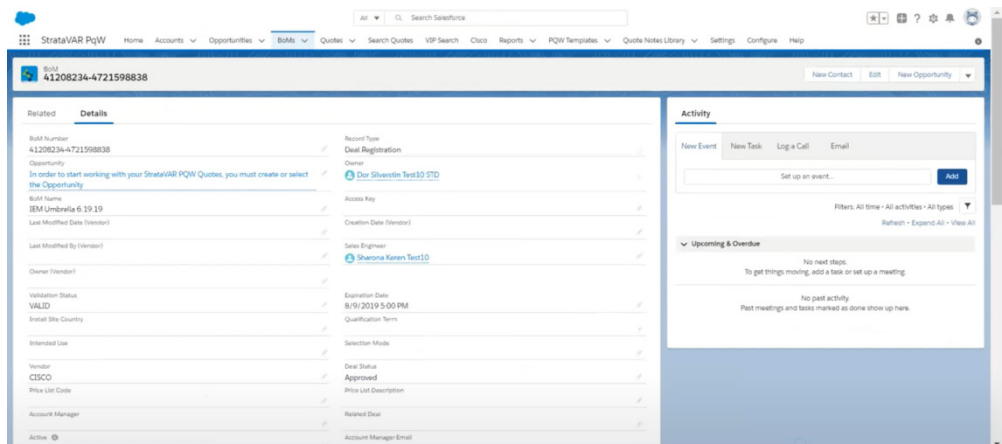
Select the **Opportunities/Projects** tab, click one of the **Opportunity Names** in the list and scroll in the right pane to view the list of related BoMs.



The screenshot shows the 'Opportunities/Projects' tab in the StrataVAR PQW interface. It displays a list of opportunities, including one with Opportunity Name 'IEM Umbrella 6.19.19'. A blue arrow points to the 'BoMs (2)' section in the right pane, which lists related BoMs with their Build Numbers and Names.

Build Number	Build Name
41208234-472159838	Deal Registration
211472079	Maintenance Build

- 2 Click one of the BoM numbers in the list to enter View mode. The following displays –



The screenshot shows the 'View' mode for a specific BoM in the StrataVAR PQW interface. It displays a detailed view of the BoM, including its Build Number, Build Name, Opportunity, and various fields like Account Name, Close Date, Amount, and Opportunity Owner. The right pane shows the 'Activity' section with options to log a call, new task, or new event.

Field	Value
Build Number	41208234-472159838
Build Name	IEM Umbrella 6.19.19
Opportunity	In order to start working with your StrataVAR PQW Quotes, you must create or select the Opportunity
Account Name	An end-customer company to whom the VAR is sending a Quote
Close Date	7/31/2019
Amount	
Opportunity Owner	Sharon Karen Test

- 3 Click the **Edit** button to edit the value in a field or click the **Edit** button at the top right of the window.
- 4 Fill in the fields, as necessary, and click the **Save** button.

► **To edit a BoM in CCW –**

- Use the [Open BoM CCW button](#). 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](#), 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

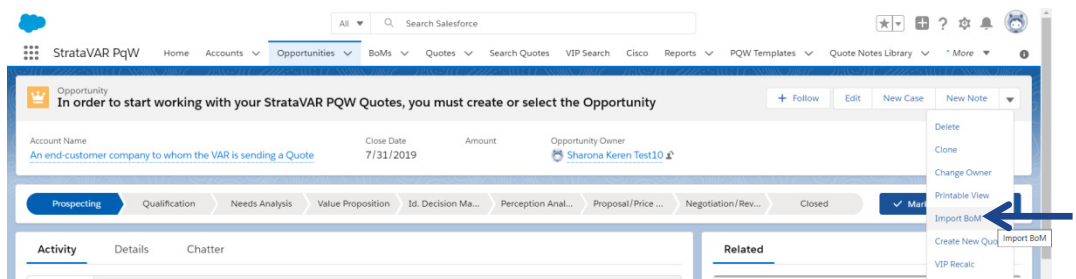
The importing of supplier sources into StrataVAR PQW in order to create BoMs comprises the following steps –

- **Clicking the Import BoM Button**, page 42
- **Defining the BoM Type**, page 44
- **Clicking the Import Button**, page 49

## 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 in the dropdown menu. You must have specified a specific account to access this option.



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

StrataVAR PQW Home Accounts Projects BoMs Quotes Sales Orders (Vendor) Search Quotes VIP Search Reports Dashboards Cisco More

Project Akash Test Account

Related Details

BoMs (1)

BOM NUMBER	RECORD TYPE	BOM NAME	TOTAL EXTENDED LIST PRICE
04346258_Rev3	Distri BoM	04346258_Rev3	5,001.50

View All

Quotes (6+)

QUOTE NUMBER	QUOTE NAME	ACCOUNT	TOTAL EXTENDED LIST PRICE
QT-000000544	Akash Test Account	Akash Test Account	\$460,156.59
QT-000000566	Akash Test Account	Akash Test Account	\$108,843.05
QT-000000643	Akash Test Account	Akash Test Account	\$0.00
QT-000000644	Akash Test Account	Akash Test Account	\$0.00
QT-000000646	Akash Test Account	Akash Test Account	\$0.00
QT-000000647	Akash Test Account	Akash Test Account	\$0.00

View All

Activity

New Event New Task Log a Call

Set up an event...

Filters: All time • All ac

Upcoming & Overdue

No next steps.  
To get things moving, add a task or set up a meeting.

No past activity.  
Past meetings and tasks marked as done show up here.

– OR –

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

StrataVAR PQW Home Accounts Projects BoMs Quotes Sales Orders (Vendor) Search Quotes VIP Search Reports Dashboards Cisco More

Project SV Renewal

Send with DocuSign Select SAP Account Import BoM

Account Sourav Test Account Owner Sys Admin Created By Sys Admin, 20/03/2020 10:21 PM Last Modified By Sys Admin, 20/03/2020 10:21 PM

Related Details

Project Name SV Renewal Owner Sys Admin

Account Sourav Test Account

Requester Email

Created By Sys Admin, 20/03/2020 10:21 PM Last Modified By Sys Admin, 20/03/2020 10:21 PM

Activity

Log a Call

Recap your call... Add

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No next steps.  
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

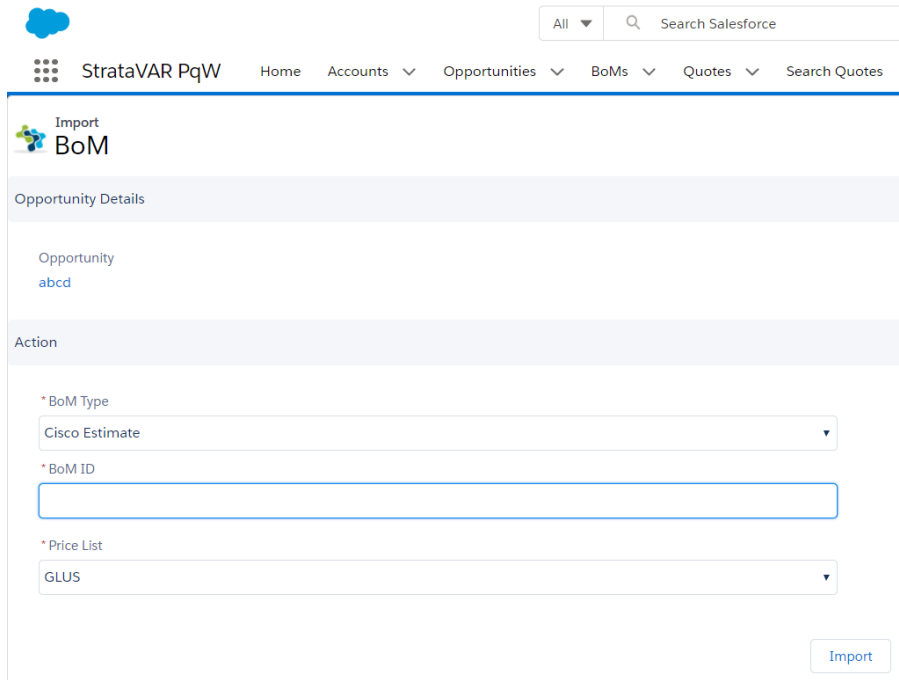
**Note** – The StrataVAR PQW BoMs and Quotes of this Project appear as related lists, as shown above.

# Defining the BoM Type

The BoM type specifies the type of source.

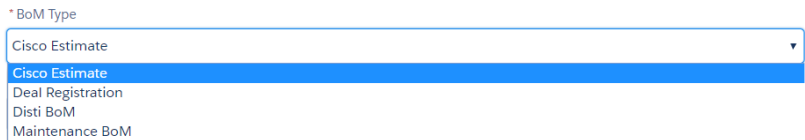
► **To define the BoM type –**

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



**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 –



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.



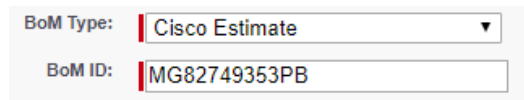
Generally, no preparation is required of these source files. StrataVAR PQW handles various formats of Disti BoMs. If it happens that you are trying to import a new unsupported Disti BoM format and you get an error message, then contact StrataVAR customer support for assistance.

- 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 45
- **Deal Registration**, page 45
- **Disti BoM**, page 46
- **Maintenance BoM**, page 47

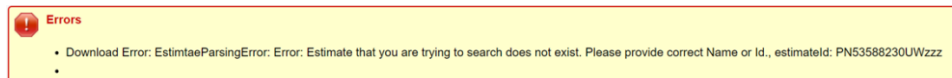
## Cisco Estimate

A Cisco estimate imports an estimate from CCW, based on the estimate ID. For more details, see [Long Cisco Estimates, Deal Registrations or Disti BoMs](#).



The screenshot shows a form with two fields. The first field is labeled 'BoM Type:' and has a dropdown menu with 'Cisco Estimate' selected. The second field is labeled 'BoM ID:' and contains the text 'MG82749353PB'.

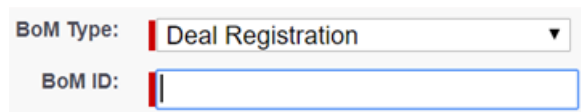
- **BoM ID** – Enter the CCW estimate ID. If the estimate ID that you enter here does not exist in CCW, then an error message is displayed. For example, as follows –



The screenshot shows an error message box with a red exclamation mark icon and the word 'Errors' in red. The message text reads: 'Download Error: EstimtaeParsingError: Error: Estimate that you are trying to search does not exist. Please provide correct Name or Id., estimateId: PN53588230UWzzz'.

## Deal Registration

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



The screenshot shows a form with two fields. The first field is labeled 'BoM Type:' and has a dropdown menu with 'Deal Registration' selected. The second field is labeled 'BoM ID:' and is an empty text box.

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

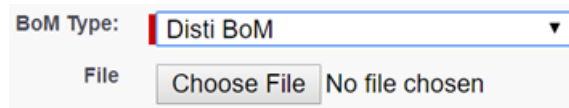
When importing an estimate, StrataVAR PQW uses the VAR Discount from the CCW estimate, if one is defined. If one is not defined, StrataVAR PQW uses account-level discounts for hardware and SMARTnet, if defined for the parent account. If this value is not defined for the Account, StrataVAR PQW uses global 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 –

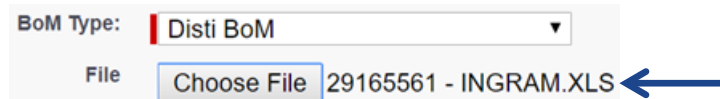
- IngramMicro
- TechData
- Westom/Comstor
- Arrow
- A custom, generic format that can be downloaded from the StrataVAR help portal at <https://help.stratavar.com/> (requires that you log in)



BoM Type: Disti BoM

File Choose File No file chosen

- **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 –



BoM Type: Disti BoM


File Choose File 29165561 - INGRAM.XLS

## 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 –

Import Summary

Results:

 **Success:**  
**Status Report: Success**

BoM Header PN53588230UW was updated successfully.  
Number of imported items: 57  
Number of items added successfully: 9  
Number of items updated successfully: 47  
Number of failed items: 0  
Number of items to delete: 27  
Number of deleted items: 27  
Number of items failed to be deleted: 0

Continue to BoM

Retry


Import Another BoM

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 –

Import Summary

Results:

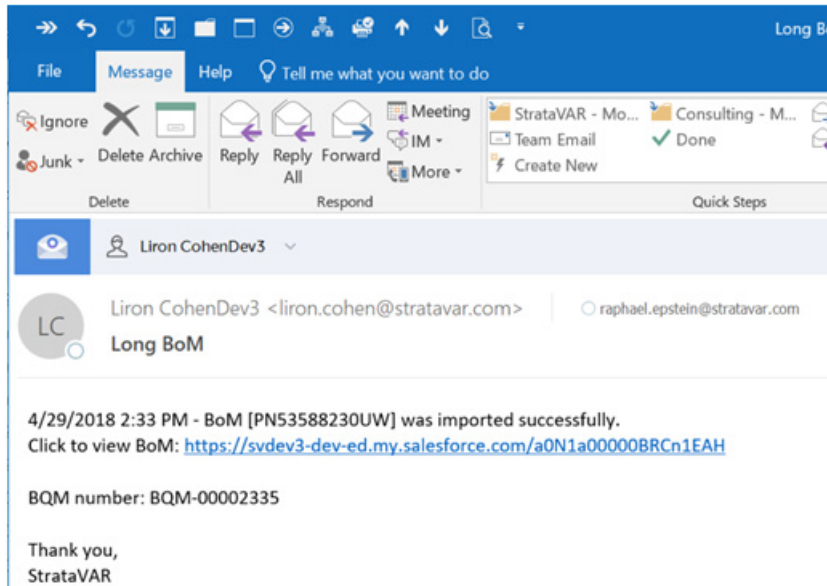
 **Success:**  
Process was queued. You will be notified by email once complete.

Continue to BoM

Retry

Import Another BoM

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.

See [Handling of Maintenance BoMs](#).

\* BoM Type

Maintenance BoM

\* Source:

CCW-R Quote

\* Import Into Existing Quote:

--None--

\* Quote Aggregated By:

None

Show Advanced Settings

\* Type:

Quote Number Id

\* Quote ID:

241204790

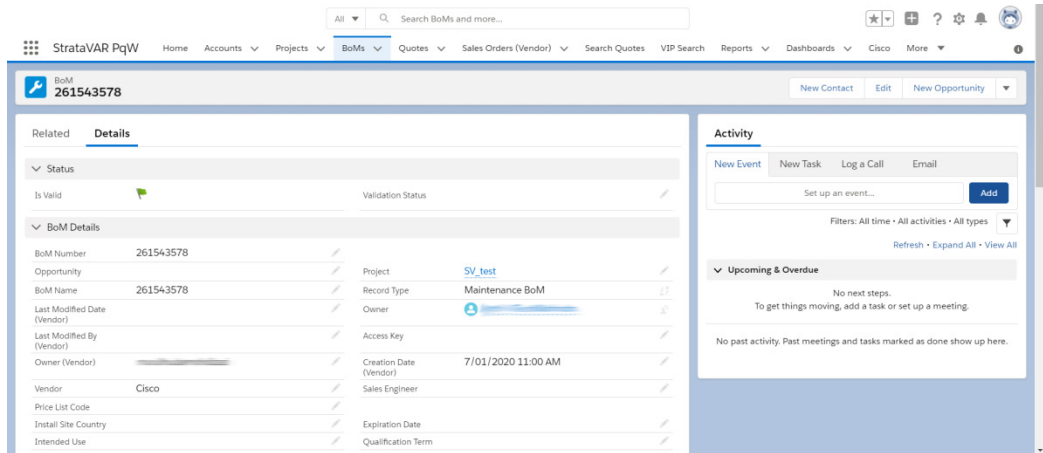
## Clicking the Import Button

### ► 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.

## Viewing the BoM Status

After importing a BoM, you can view its status at the top of the page. A green checkmark indicates that the BoM's status is OK. A red octagonal sign indicates that the BoM's status is Invalid.



The screenshot shows the StrataVAR PqW interface. The top navigation bar includes links for Home, Accounts, Projects, BoMs, Quotes, Sales Orders (Vendor), Search Quotes, VIP Search, Reports, Dashboards, Cisco, and More. A search bar is located at the top right. The main content area is divided into three tabs: Status, Details, and Activity. The Details tab is active, displaying a table of BoM details for BoM 261543578. The table includes fields such as BoM Number, Opportunity, BoM Name, Last Modified Date (Vendor), Last Modified By (Vendor), Owner (Vendor), Vendor, Price List Code, Install Site Country, Intended Use, Project, Record Type, Owner, Access Key, Creation Date (Vendor), Sales Engineer, Expiration Date, and Qualification Term. A green checkmark indicates the BoM's status is OK. The Activity tab shows a list of activities, including New Event, New Task, Log a Call, and Email. The Upcoming & Overdue section shows no next steps and no past activity.

## 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.

The screenshot shows the 'Details' tab for a BoM item with ID GK107158161CD. The interface includes a top navigation bar with 'StrataVAR PqW' and various menu items like Home, Accounts, Projects, BoMs, Quotes, Sales Orders (Vendor), Search Quotes, VIP Search, Reports, Dashboards, Cisco, and More. Below the navigation bar, there's a search bar and a 'New Contact' button. The main content area is divided into two sections: 'Related' and 'Details'. The 'Details' section contains a 'Status' section with 'Is Valid' and 'Validation Status' (VALID), and a 'BoM Details' section with fields like BoM Number, Opportunity, BoM Name, Copy Of Copy Of All Items-SV test, Last Modified Date (Vendor), Last Modified By (Vendor), Owner (Vendor), Vendor, and Cisco. The 'Activity' section on the right includes a 'New Event' button, a 'Set up an event...' input field, and a list of filters: All time, All activities, All types. Below this is an 'Upcoming & Overdue' section with 'No next steps' and 'No past activity'.

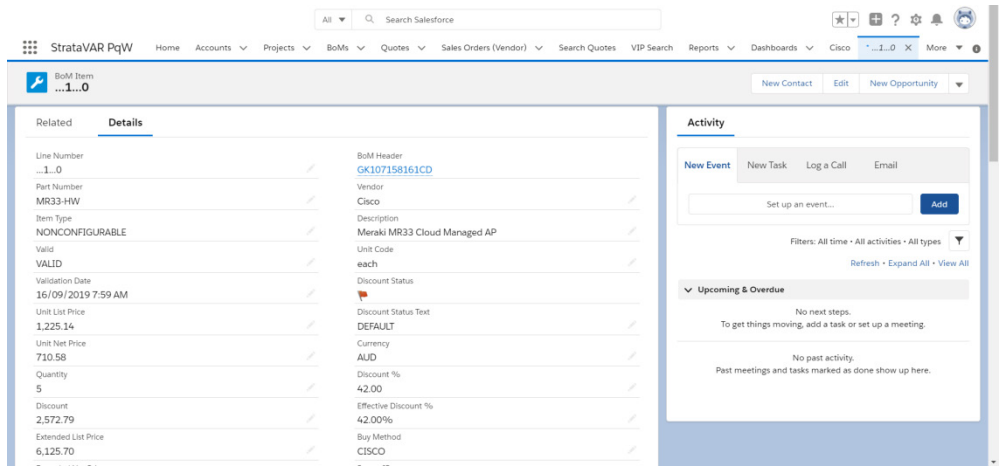
**Note** – The layout of this page may appear differently than shown above, because you can customize the layout to specify which fields are displayed and their location on the page.

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

The screenshot shows the 'Related' tab for the same BoM item. A blue arrow points to the 'BoM Items (6+)' section. This section contains a table with columns: LINE NUMBER, STATUS, PART NUMBER, and DESCRIPTION. The table lists six items with their respective line numbers, statuses, part numbers, and descriptions. Below the table is a 'View All' link. There are also sections for 'BoM Attachments (0)' and 'Disti Quotes (0)' with a 'New' button.

LINE NUMBER	STATUS	PART NUMBER	DESCRIPTION
...1...0	VALID	MR33-HW	Meraki MR33 Cloud Managed AP
...2...0	VALID	LIC-ENT-3YR	Meraki MR Enterprise License, 3YR
...3...0	VALID	C1111-4PLTELA-DNA	ISR 1100 4 Port Dual GE LTE LA...
...3...0...1		CON-PSOP-C11114PL	PRTRN SUP OS 24X7X4 ISR 1100...
...3...1		EM7430-LTEA-LA	LTE Advanced EM7430 LATAM an...
...3...2		PWR-66W-AC-V2	Power Supply 66 Watt AC V2 for ...

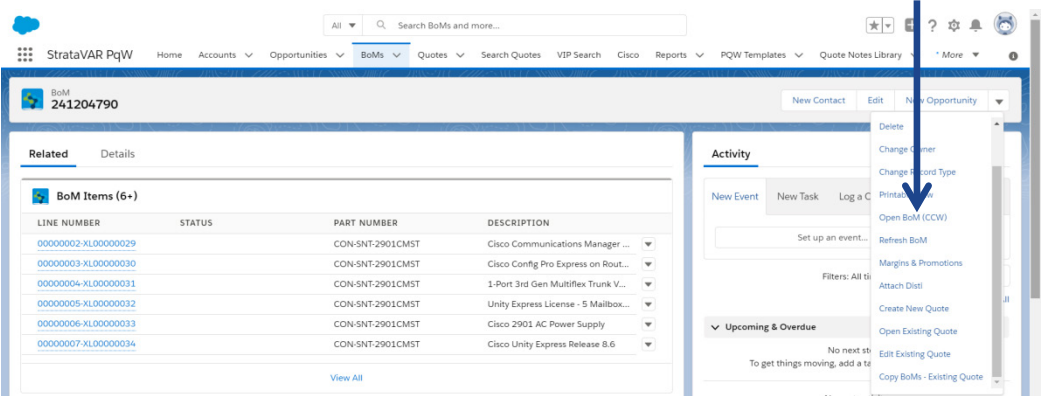
- 3 To display the details of a specific item in the BoM, click one of the **Line Numbers** in the BoMs items related list. The following displays –



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 –



#### 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](#). 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.

## Attach Disti Button

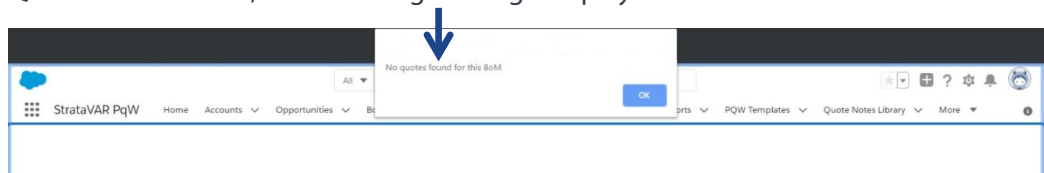
Attaches a Quote from distributors in a known format, in order for PQW to automatically parse the information. See [Disti BoM](#) for more details about the Distis supported by PQW.

## Create New Quote Button

Creates a new Quote.

## Open Existing Quote Button

This option opens an existing Quote linked to this BoM. If there are no existing Quotes for this BoM, the following message displays –



## Edit Existing Quote Button

Displays a list of existing Quotes linked to this BoM. Select a Quote in this list to edit the Quote.

## Copy BoMs – Existing Quote Button

Copies BoMs from an existing Quote.

### 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.

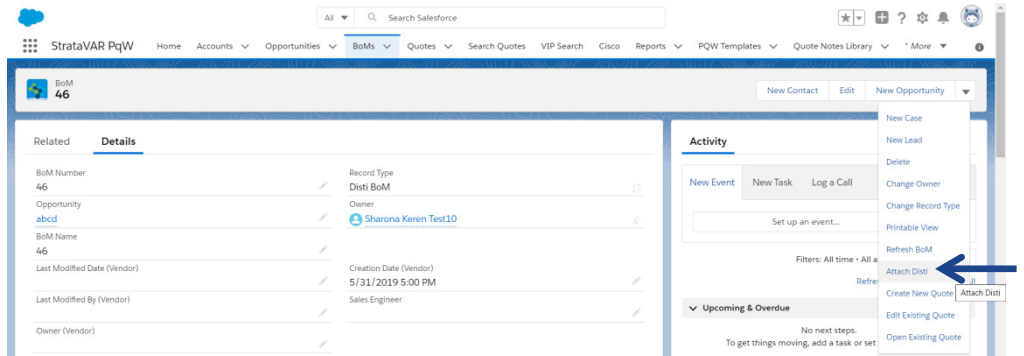
The purpose of a Disti Quote Merge is to compare the quote received from a Disti with the original CCW BoM (downloaded from Cisco) in order to ensure that **all** the same items exist and that the quantities are identical and correct. This merge and comparison enables you to identify discrepancies and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

## Import Format

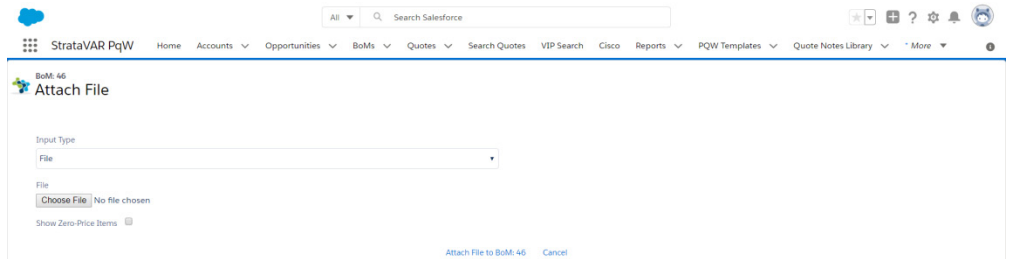
StrataVAR PQW is provided with the ability to parse various types of input formats, whether they are received electronically using an API or imported from an Excel file. These formats are listed on page 14.

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

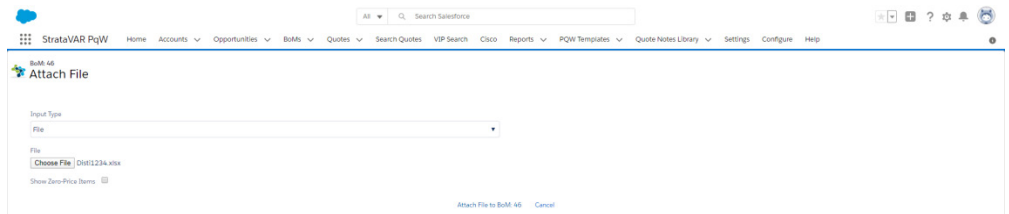
- 1 Import the Source BoM, which can be either a CCW Estimate or a CCW Quote.
- 2 Open the [BoM Details](#) page of this BoM.
- 3 Click the **Attach Disti** button.



The following displays –



- 4 Click the **Choose File** button and select a **Disti Quote** Excel file.



5 Click the **Attach File to BoM** button. Then, click **Import**. The following displays –

StrataVAR

Search...

Search

Switch to Lightning Experience

Refi Dev3-Epstein

Help

StrataVAR

Home

Accounts

Opportunities

BoMs

Quotes

Search Quotes

VIP Search

Reports

Dashboards

Settings

Configure

Help

PQW 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: 15442510-4710739307 -- IngramMicro: 10788191-29639031

Vendor Total Extended Price: 163,276.80

Dist1 Total Extended Price: 58,867.80

Page 1 of 4

10 ▼

Total Records Selected: 0

# of Issues (not OK): 28

View 1 - 10 of 38

Vendor BoM: 15442510-4710739307

Dist1 BoM: IngramMicro 10788191-29639031

Match	Ln #	Part Number	Description	Qty	Buy Metl	Price Sec	List Price	Ext. List #	Disct	Ext. Price	Ln #	Part Number	Description	Qty	Dist1	List Price	Disct	Ext. Price
1	OK	-1.1	C1F1AA8R1K9<	One One Foundation f	2	IngramMicro	17,500.00	35,000.00	59.00	14,350.00	0001-X C1F1AA8R1K9<	ONE FOUNDATION PEI	2	IngramMicro	17,500.00	59.00	14,350.00	
2	OK	-1.1.0	CON-ECML-CFAS1	GWSS UPGRADER C1	2	2-Tier	2,625.00	5,250.00	32.00	3,570.00						0.00	0.00	0.00
3	OK	-2.0	PVDM-64<	64-channel DSP module	1	IngramMicro	3,400.00	3,400.00	59.00	1,304.00	0003-X PVDM-64<	64-CHANNEL DSP MC	1	IngramMicro	3,400.00	59.00	1,304.00	
4	OK	-3.0	LSR-LA-E-35X0<	LivAction Ext Perptual	1	IngramMicro	35,400.00	35,400.00	59.00	14,514.00	0011-X LSR-LA-E-35X0<	LIVACTION EXT PERFR	1	IngramMicro	35,400.00	59.00	14,514.00	
5	OK	-4.1	ASAS516-FPWYR-K	ASA 516X WITH FWPC	4	IngramMicro	5,995.00	23,980.00	59.00	9,831.80	0011-X ASAS516-FPWYR-K	ASA 516-X WITH FIRE	4	IngramMicro	5,995.00	59.00	9,831.80	
6	OK	-4.1.0	CON-SNTP-ASAS56	SMARTNET 247X4 AS	4	2-Tier	1,150.00	4,600.00	32.00	3,128.00						0.00	0.00	0.00
7	OK	-4.2.0	LAASAS16-TAMC-1	CON ASAS516 FWPC	4	IngramMicro	1,600.00	7,200.00	59.00	2,952.00	0011-X LAASAS16-TAMC-1	11YR SUB ASAS516 FIR	4	IngramMicro	1,600.00	59.00	2,952.00	
8	OK	-4.3	FS-VMM-10-SW-K	Cono FireSight Manag	4	IngramMicro	2,000.00	2,000.00	59.00	620.00	0012-X FS-VMM-10-SW-K	FIRESIGHT MANAGEM	1	IngramMicro	2,000.00	59.00	620.00	
9	OK	-4.3.0	CON-SAU-MWMSV1	SW APP SUPP - UPGR	1	2-Tier	400.00	400.00	32.00	272.00						0.00	0.00	0.00
10	OK	-5.0	ISRA431K9	Cisco ISR 4431 4GE,3S	1	IngramMicro	11,000.00	22,000.00	59.00	4,510.00	0002-X ISRA431K9	ISR 4431 4GE SNIM 8C	1	IngramMicro	11,000.00	59.00	4,510.00	
Total:							139,230.00	60.25	53,341.80		Total:	117,980.00	59.00	48,371.80				

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10 ▼

View 1 - 10 of 38

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- **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...

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)

+

▼

View Errors

View All

Update Vendor BoM-All

Update Vendor BoM-Prices

Update Vendor Discount Only

Export to Excel

Quote Merge: Vendor BoM: 15442510-4710739307 - IngramMicro 10788191-29639031

Vendor Total Extended Price: 163,276.80 Dist Total Extended Price: 58,867.80

Vendor BoM: 15442510-4710739307 Distri BoM: IngramMicro 10788191-29639031

Total Records Selected: 0 # of Issues (not OK): 28

View 11 - 20 of 36

Match	Ln #	Part Number	Description	Qty	Buy Met	Price So	List Price	Ext. List	Disct	Ext. Price	Ln #	Part Number	Description	Qty	Disti	List Price	Disct	Ext. Price
11	?	OK	VTP-ISR4431 SMARTNET 24X7X4 C	2	2-Tier	1,886.00	3,332.00	32.00										
12	#S	List Price Mismatch	AC Power Supply (Seco	2	IngramMicro	800.00	1,800.00	58.00			0003	PWR-4430-AC/2	AC PWR SUP SECOND	1	IngramMicro	800.00	58.00	328.00
13	#S	Ext Price Mismatch	SR4431SK9= Cisco ONE Foundation	2	2-Tier	5,000.00	10,000.00	39.00		6,100.00	0004	C1F1AISR4431SK9=	ONE FOUNDATION PE	1	IngramMicro	5,000.00	58.00	2,060.00
14	?	Qty Mismatch	CMU-C1F440 SWSS UPGRADES Cisc	2	2-Tier	750.00	1,500.00	32.00		1,020.00								
15	OK	Missing Items	C1AU4ISR4400SK9= Cisco ONE Advanced App	1	IngramMicro	3,000.00	3,000.00	58.00		1,230.00	0008	C1AU4ISR4400SK9=	ONE ADVANCED APP F	1	IngramMicro	3,000.00	58.00	1,230.00
16	?	Disct Mismatch	CON-ECMU-C1A440 SWSS UPGRADES C1	1	2-Tier	400.00	400.00	32.00		306.00								
17	?	Disct Mismatch	CON-ISA4409= Cisco Identity Services E	1	2-Tier	25,980.00	25,980.00	38.00		15,864.00								
18	?	Disct Mismatch	CON-SA44HSE8W SW APP SUPP + UPRD	1	2-Tier	5,188.00	5,188.00	32.00		3,535.00								
19	?	Disct Mismatch	L-ISE-80E-1500= Cisco Identity Services E	1	2-Tier	7,500.00	7,500.00	39.00		4,575.00								
20	?	Disct Mismatch	ISE-PLS-3YR-1500 Cisco ISE 3-Yr 1500 Em	1	2-Tier	22,400.00	22,400.00	39.00		13,664.00								
			Total:			88,970.00	39.23	48,206.00								8,800.00	58.00	3,608.00

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- 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 Dist Total Extended Price:

Vendor BoM: 15442510-4

Match	Ln #	Part Number	Description	Qty	Buy Met
11	?	OK	VTP-ISR4431 SMARTNET 24X7X4 C	2	2-Tier
12	#S	Price Mismatch	AC Power Supply (Seco	2	IngramMicro
13	#S	Ext Price Mismatch	SR4431SK9= Cisco ONE Foundation	2	2-Tier
14	?	Qty Mismatch	CMU-C1F440 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.

StrataVAR PQW

[Home](#)
[Accounts](#)
[Opportunities](#)
[BoMs](#)
[Quotes](#)
[Search Quotes](#)
[VMP Search](#)
[Clco](#)
[Reports](#)
[PQW Templates](#)
[Quote Notes Library](#)
[Settings](#)
[Configure](#)
[Help](#)

Vendor Total Extended Price: 42,737.06											Disti Total Extended Price: 42,737.06														
Vendor BOMs											Disti BOMs														
Match	Ln #	Part Number	Description	Qty	Buy Method	Price Source	List Price	Ext. List Price	Discount	Ext. Price	Match	Ln #	Part Number	Description	Qty	Buy Method	List Price	Ext. List Price	Discount	Ext. Price					
1	%	0000-0001-XI-CPES-SS-PREMIUM-ADD	Support - Direct Premium	2			7,956.25	15,912.50	83.51	7,387.17	1	%	0001-0001-CPES-SS-PREMIUM-ADD	Support - Direct Premium	2	Generic	7,956.25	15,912.50	86.71	7,387.17					
3	%	0000-0003-XI-CPES-SS-PREMIUM-ADD	Support - Direct Premium	1			7,956.25	7,956.25	7.93	7,387.17	3	%	0001-0003-CPES-SS-PREMIUM-ADD	Support - Direct Premium	1	Generic	7,956.25	7,956.25	87.42	7,387.17					
3	%	0000-0003-XI-CPES-SS-PREMIUM-ADD	Support - Direct Premium	1			829.69	829.69	7.93	771.36	3	%	0001-0003-CPES-SS-PREMIUM-ADD	Support - Direct Premium	1	Generic	829.69	829.69	87.42	771.36					
4	%	0000-0004-XI-CPES-SS-PREMIUM-ADD	Support - Direct Premium	1			829.69	829.69	7.93	771.36	4	%	0001-0004-CPES-SS-PREMIUM-ADD	Support - Direct Premium	1	Generic	829.69	829.69	87.42	771.36					
5	%	0000-0005-XI-CPES-NGTTP-3200-2Y	Next Generation Threat Prevention	1			14,197.66	14,197.66	7.93	13,199.90	5	%	0001-0005-CPES-NGTTP-3200-2Y	Next Generation Threat Prevention	1	Generic	14,197.66	14,197.66	87.42	13,199.90					
6	%	0000-0006-XI-CPES-NGTTP-3200-2Y	Next Generation Threat Prevention	1			14,197.66	14,197.66	7.93	13,199.90	6	%	0001-0006-CPES-NGTTP-3200-2Y	Next Generation Threat Prevention	1	Generic	14,197.66	14,197.66	87.42	13,199.90					
				<b>Total:</b>						63,923.49	26.74	<b>42,737.06</b>					<b>Total:</b>						63,923.49	26.74	<b>42,737.06</b>

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 –

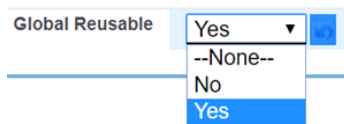
A1																			
IngramMicro-10788191-29639031-15442510-4710739307																			
IngramMicro-10788191-29639031-15442510-4710739307																			
Report generated <a href="#">www.StrataVAR.com</a> on 2018/05/06 13:10:06																			
Match Ln # Part Number Description Qty Svc. Dur. Buy Method Price Source List Price Ext. List Price Discount Ln # Part Number Description Qty Disti List Price Discount																			
#5 ...5.3 PWR-4430-AC/2 AC Power Supply (Seco 2.00 IngramMicro 800.00 1,600.00 59.00 0003-PWR-4430-AC/2 AC PWR SUP SECONDARY 1.00 IngramMicro 800.00 59.00																			
#5- % ...6.1 CLF1A1SR44315K9 Cisco ONE Foundation Pe 2.00 2-Tier 5,000.00 10,000.00 39.00 6,100.00 0004-CLF1A1SR44315K9 ONE FOUNDATION PERPE 1.00 IngramMicro 5,000.00 59.00																			
Report generated <a href="#">www.StrataVAR.com</a> on 2018/05/06 13:10:06																			

### 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 –**

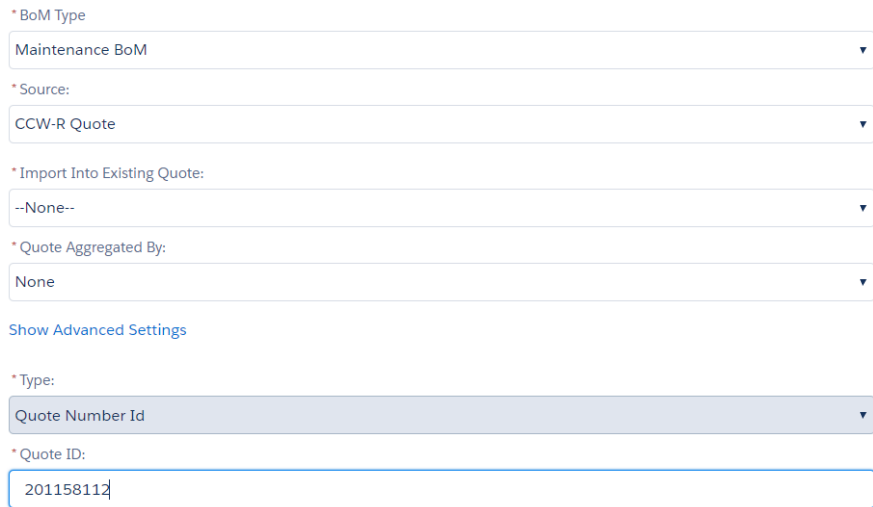
- 1 [Import a source quote](#) in order to create a BoM.
- 2 [Edit the BoM.](#)
- 3 Change the **Global Reusable** field to **Yes**. For more details, see [Selecting and Copying BoM Items into the Quote](#).

A screenshot of a web form showing a dropdown menu for the 'Global Reusable' field. The dropdown is open, displaying four options: 'Yes' (highlighted in blue), '--None--', 'No', and 'Yes' (at the bottom). The label 'Global Reusable' is to the left of the dropdown.

## 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).

A screenshot of a web form for importing a Maintenance BoM. The form contains several dropdown menus and a text input field. The fields are: '\* BoM Type' (Maintenance BoM), '\* Source:' (CCW-R Quote), '\* Import Into Existing Quote:' (--None--), '\* Quote Aggregated By:' (None), 'Show Advanced Settings' (a link), '\* Type:' (Quote Number Id), and '\* Quote ID:' (201158112).

\* BoM Type  
Maintenance BoM

\* Source:  
CCW-R Quote

\* Import Into Existing Quote:  
--None--

\* Quote Aggregated By:  
None

Show Advanced Settings

\* Type:  
Quote Number Id

\* Quote ID:  
201158112

Import

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 69).

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.

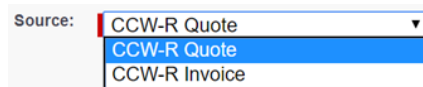
As a result, at the end of this batch process, one email notification is sent to indicate the following–

- **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 44, from the dropdown menu, select either **CCW-R Quote** or **CCW-R Invoice** –

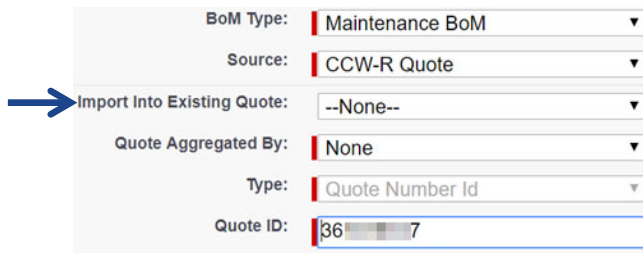


The image shows a screenshot of a web application's 'Source' field. It is a dropdown menu with a white background and a blue border. The text 'Source:' is to the left of the dropdown. The dropdown itself is open, showing two options: 'CCW-R Quote' and 'CCW-R Invoice'. The 'CCW-R Quote' option is highlighted with a blue background. There is a small downward arrow icon on the right side of the dropdown box.

- **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

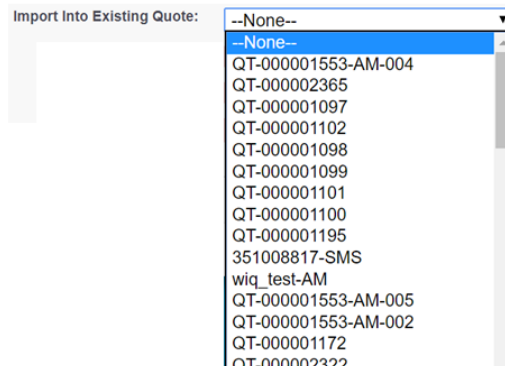
Import Into Existing Quote: --None--

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.

\* Quote Aggregated By:

Custom

\* Quote Aggregate Fields:

Source Service Level Service Type Site Country Enterprise SKU

Show Advanced Settings

\* Type:

Quote Number Id

\* Quote ID:

201158112

--None--  
Enterprise SKU  
Part Number  
Original Item  
Service Type  
Site Country  
Site Id  
Site Name  
Source Service Level  
Takeover

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.

The screenshot shows the StrataVAR web application interface. The top navigation bar includes links for Home, Accounts, Opportunities, Quotes, Search Quotes, VP Search, Reports, Dashboards, Cisco, PQW Templates, Quote Notes Library, Settings, Configure, Help, and Batch Quote Manager. The main content area is titled 'Import BoM' and shows a form for 'Quote Aggregated By' with a dropdown menu set to 'All'. Other fields include 'Quote Aggregated For' (set to 'Custom'), 'Quote Aggregated Field' (set to 'Site Country'), 'Quote Aggregated By' (set to 'All'), and 'Quote Aggregated By' (set to 'All'). The 'Quote Aggregated By' field is highlighted with a red box.

## 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 ▼	Service Type ▼	Site Country ▼
------------------------	----------------	----------------

\* Part Number Presentation:

Do not display ▼	Do not display ▼	Do not display ▼	Do not display ▼
------------------	------------------	------------------	------------------

\* Description Presentation:

Do not display ▼	Do not display ▼	Do not display ▼	Do not display ▼
------------------	------------------	------------------	------------------

\* Type:

Quote Number Id ▼
-------------------

\* Quote ID:

201158112
-----------

- **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 ▼	Show - no label ▼
-------------------	-------------------	-------------------	-------------------

\* Description Presentation:

Show with label ▼	Show - no 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 64 –
  - **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 64 –
  - **Show with Label**
  - **Show No Label**
  - **Do Not Display**

For example, the following shows how the part number and description display when the **Show with Label** option is selected in both the **Part Number Presentation** and **Description Presentation** fields. The label is the group name/type, and is based on your selection in the **Grouping** field –

Name	Part Number	Description	List Price/MSRP	Term	Qty	Total List Price	VAR Unit Price	VAR Unit Cost	VAR Total Price	VAR Margin	VAR Total Profit	Cost Unit Price	Cost Ext Price	Item Type	Units	Vendor
SAS - Qty 1			3,298.63	35.00	1	3,298.63	35.00	2,144.11	1,154.52	0.00	3,298.63	3,298.63	3,298.63	Service		Cisco
QTTM-000179558	Source Service Level SAS No	Source Service Level SAS No	3,298.63		1	3,298.63	35.00	2,144.11	1,154.52	0.00	3,298.63	3,298.63	3,298.63	Service		Cisco
SNT - Qty 1			89,816.41	35.00	1	89,816.41	35.00	58,389.70	31,426.71	0.00	89,816.41	89,816.41	89,816.41	Service		Cisco
QTTM-000179552	Source Service Level SNT No	Source Service Level SNT No	89,816.41		1	89,816.41	35.00	58,389.70	31,426.71	0.00	89,816.41	89,816.41	89,816.41	Service		Cisco

The following shows another example where **Show No Label** is selected in both the **Part Number Presentation** and **Description Presentation** fields.

Name	Part Number	Description	List Price/MSRP	Term	Qty	Total List Price	VAR Unit Price	VAR Unit Cost	VAR Total Price	VAR Margin	VAR Total Profit	Cost Unit Price	Cost Ext Price	Item Type	Units	Vendor
SAS - Qty 1			3,298.63	35.00	1	3,298.63	35.00	2,144.11	1,154.52	0.00	3,298.63	3,298.63	3,298.63	Service		Cisco
QTTM-000179558	SAS No	SAS No	3,298.63		1	3,298.63	35.00	2,144.11	1,154.52	0.00	3,298.63	3,298.63	3,298.63	Service		Cisco
SNT - Qty 1			89,816.41	35.00	1	89,816.41	35.00	58,389.70	31,426.71	0.00	89,816.41	89,816.41	89,816.41	Service		Cisco
QTTM-000179552	SNT No	SNT No	89,816.41		1	89,816.41	35.00	58,389.70	31,426.71	0.00	89,816.41	89,816.41	89,816.41	Service		Cisco

- **Quote ID** – This ID uniquely identifies the CCW-R Renewal Quote to be imported into StrataVAR PQW.

### 3.4.3 CCW-R Invoice

This type of Quote is typically a tier 2 Partner. Selecting and defining the import of a **CCW-R Invoice** into StrataVAR PQW is very similar to for **CCW-R Quote**, as described above. The primary difference is regarding the StrataVAR PQW BoM and Quote that is generated.

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
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">281147147-SMS</a>	Maintenance BoM	281147147-BCBS Serial Lookup 1yr SNT	0.00	0.00		0.00		Valid	5/14/2018
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">221023292</a>	Maintenance BoM	221023292-Ball 1YR	0.00	0.00		0.00		Valid	5/4/2018
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">221023292-Detailed</a>	Maintenance BoM	221023292-Ball 1YR	399,817.61	15.00		339,844.79		Valid	2/24/2018
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">221023292-SMS</a>	Maintenance BoM	221023292-Ball 1YR	399,116.21	15.00		339,248.60		Valid	2/24/2018
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">9845653</a>	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
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">QT-000002501</a>	1	MG Maint Tests	\$63,584.16	\$39,425.61	37.99	\$24,158.55	\$63,584.16	0.00	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">QT-000002496</a>	1	MG Maint Tests	\$63,584.16	\$39,425.61	37.99	\$24,158.55	\$63,584.16	0.00	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">QT-000002495</a>	1	MG Maint Tests	\$63,584.16	\$39,425.61	37.99	\$24,158.55	\$63,584.16	0.00	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">QT-000002487</a>	1	MG Maint Tests	\$63,584.16	\$39,425.61	37.99	\$24,158.55	\$63,584.16	0.00	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">QT-000002406</a>	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

*This page was intentionally left blank for double-sided printing.*





## 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 39.

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 125. 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.

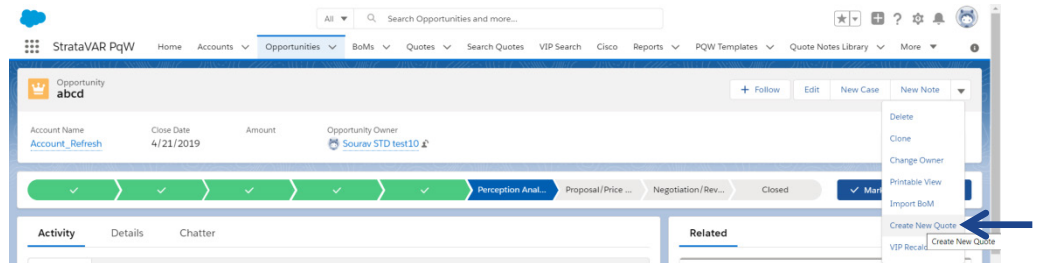
► **To create a Quote from the Opportunities/Projects tab –**

- 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–

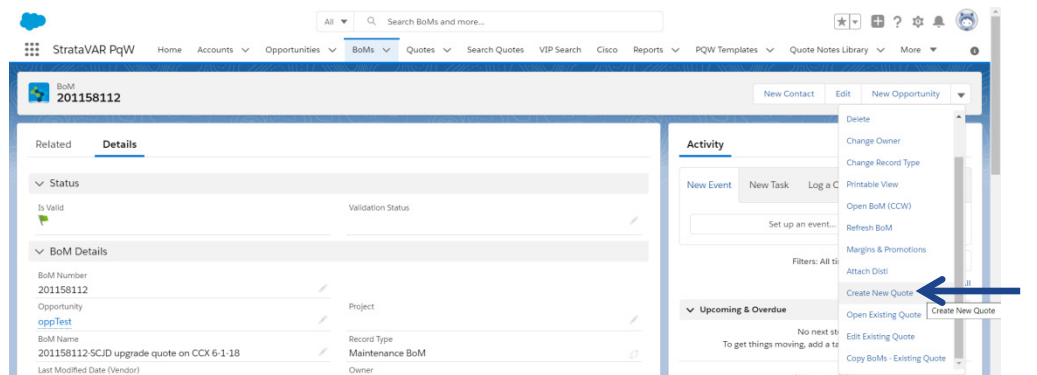
To display a Project, click the **Project** tab at the top of the window, and then click a Project to display the **Project Details** tab.

- 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 125. 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 –

Edit QT-000000224

Quote Type

--None--

Quote Number

QT-000000224

Quote Name

abcd

Quote Name Suffix ⓘ

Quote Version

1

Opportunity

abcd

Account

Account\_Refresh

Contact

Search Contacts...

Sales Engineer

Search People...

Quote Auto Number

QT-000000224

Import Statistics

BoM Source

Available

Chosen

Cisco Direct

IngramMicro

Comstor

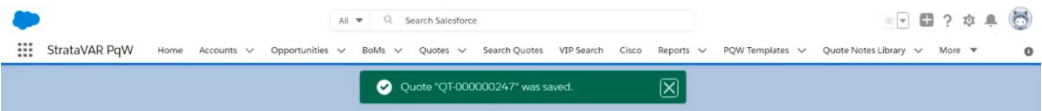
Cancel

Save & New

Save

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

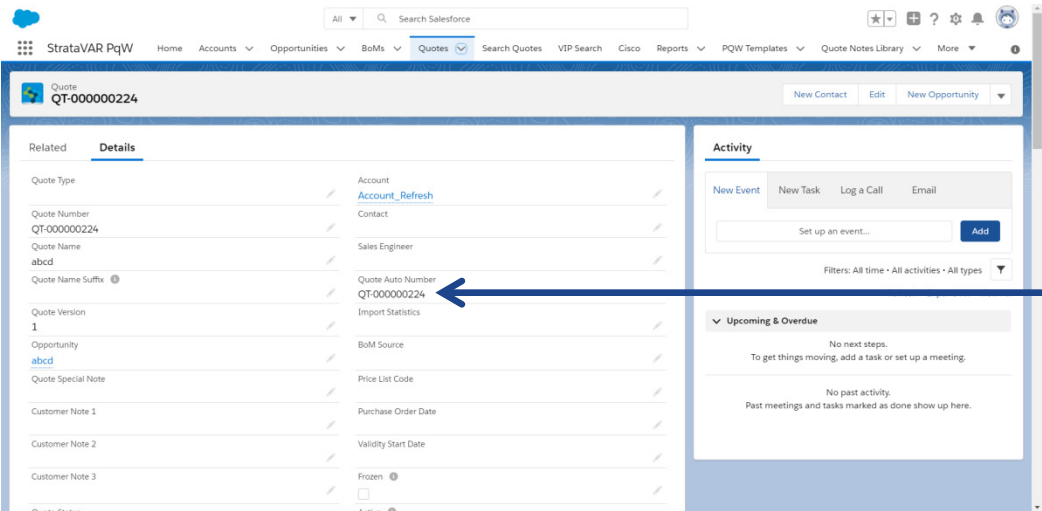
Fill in the displayed fields (as described below) and then click the **Save** button. A confirmation message displays –



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 –



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 125).

## 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.

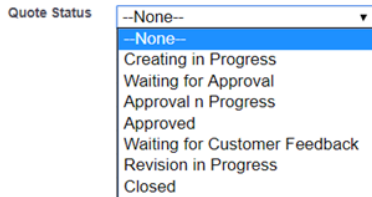
## Quote Special Note and Customer Note 1, 2, 3

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 125.

StrataVAR PQW provides a library of notes, as described on page 78.

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

## Sales Engineer

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

## VIP Effective Date


This field indicates the date to use for VIP calculations. VIP calculations are based on a specific VIP version. VIP versions are active for a period of three months or six months. The **VIP Effective Date** must fall within the date range covered by the VIP version that you want to use. For example, let's say that you want to use VIP 35, which is valid between January 25, 2020–July 24, 2020. Therefore, in order to use VIP 35 for VIP calculations for the Quote, the **VIP Effective Date** must fall between these two dates.

The default VIP effective date is based on the **Close Date** of the Opportunity upon which the Quote is based. The **VIP Effective Date** can be changed as needed. For more details, see page 24.

## VIP Payout

The VIP Info section in the Quote window displays VIP-related parameters currently applied to calculate the Quote.

The **VIP Payout** field specifies the discount percentage applied when calculating the Quote. The **Incremental %** specifies the additional Cisco VIP rebate to be applied to the Quote. Both are applied to the **List Price** to determine the **Item Payout Rebate**, which represents the total discount applied for VIP purposes to the Quote calculation. The **Incremental %** is based on the VIP version in use for the Quote calculations. For more details, see page 34.

 Quote Item <b>QTITM-000920161</b>	
VIP Info	
Track Name VIP ARCHITECTURE	Subtrack Name MERAKI
Product Family CNWRL	Category Name I
VIP Payout ⓘ 2.00%	Incremental % ⓘ
Item Payout Rebate ⓘ \$123.00	DNA Accelerator
VIP Version VIP34	Dollar Allocation Percentage 100.00%



Let's look at an example in more detail. Let's assume that the **List Price** for a Quote is \$1,225.14, with a **Quantity** of 5, a **VIP Payout** of 2.00 % and an **Incremental %** of 1.00%.

Quote Item  
QTITM-000920161

Pricing

List Price ⓘ  
\$1,225.14

Quantity  
5

Total List Price ⓘ  
\$6,125.70

VAR Discount % ⓘ  
0.00%

VAR Unit Cost ⓘ  
\$1,225.14

VAR Markup % ⓘ  
13.64%

VAR Margin ⓘ  
\$167.06

VAR Margin % ⓘ  
12.00%

VAR Total Profit ⓘ  
\$835.32

VAR Total Cost ⓘ  
\$6,125.70

VAR Discount Type ⓘ  
LP Minus

Cust Discount % ⓘ  
-13.64%

Cust Unit Price ⓘ  
\$1,392.20

BoM Original Quantity ⓘ  
5

Cust Extended Price ⓘ  
\$6,961.02

Customer Discount Type  
LP Minus

Quote Item  
QTITM-000920161

VIP Info

Track Name  
VIP ARCHITECTURE

Product Family  
CNWRL

VIP Payout ⓘ  
2.00%

Item Payout Rebate ⓘ  
\$184.00

VIP Version  
VIP35

Subtrack Name  
MERAKI

Category Name  
I

Incremental % ⓘ  
1.00%

DNA Accelerator  
0.00%

Dollar Allocation Percentage  
100.00%

Ref to BoM Info

Line Type  
MAJOR

BoM ⓘ  
WY94687637AC

BoM Item ⓘ  
1.0

Group Level 1

Primary Line Number ⓘ  
a02f400000N3sAWAAZ....1

BoM Line Number  
...1...0

This means that to calculate the **Item Payout Rebate** amount, the Quote calculation sums the percentages in the **VIP Payout** and **Incremental %** fields to determine the amount of the VIP discount. This sum is then multiplied by the **Quantity** value to determine the **Item Payout Rebate** amount. For our example above, this means that 2.00% (**VIP Payout**) + 1.00% (**Incremental %**) = 3.00%. 3.00% is then multiplied by 5 (**Quantity**) = \$183.77 (**Item Payout Rebate**). The **Item Payout Rebate** amount is rounded to the nearest dollar. For example, \$183.01–\$183.50 is rounded to \$183 and \$183.51–\$183.99 is rounded to \$184.

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

StrataVAR PQW

Home Accounts Opportunities BoMs Quotes Search Quotes VIP Search Cisco Reports PQW Templates Quote Notes Library More

Quote  
QT-000000224

New Contact Edit New Opportunity

Related

Quote Type

Account  
Account\_Refresh

Quote Number  
QT-000000224

Contact

Quote Name  
abcd

Sales Engineer

Quote Name Suffix ⓘ

Quote Auto Number  
QT-000000224

Quote Version  
1

Import Statistics

Opportunity  
abcd

BoM Source

Quote Special Note

Price List Code

Customer Note 1

Purchase Order Date

Customer Note 2

Validity Start Date

Customer Note 3

Frozen ⓘ

Quote Status

Active

Activity

New Event

New Task

Log a Call

Email

Set up an event...

Add

Filters: All time • All activities • All types


Refresh • Expand All • View All

Upcoming & Overdue

No next steps.  
To get things moving, add a task or set up a meeting.

No past activity.  
Past meetings and tasks marked as done show up here.

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

 **Quote Items (6+)**

[New](#)

QUOTE ITEM NAME	PART NUMBER	QUANTITY	TOTAL LIST PRICE	
<a href="#">QTITM-000028664</a>	CAB-AC-C6K-TWLK=	10	\$450.00	▼
<a href="#">QTITM-000028665</a>	GLC-SX-MMD=	5	\$2,500.00	▼
<a href="#">QTITM-000028666</a>	SFP-10G-LRM=	44	\$48,400.00	▼
<a href="#">QTITM-000028667</a>	SFP-GE-S-RF	1	\$332.00	▼
<a href="#">QTITM-000028668</a>	WS-C4506E-S7L+96V+	10	\$180,000.00	▼
<a href="#">QTITM-000028669</a>	CON-SNT-C4506S7L	10	\$10,920.00	▼

[View All](#)

### 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.

Quote Special Note

Quote Special Note

new

**Quote Notes Library**

1 Result

NOTES NAME	ACTIVE	DESCRIPTION	LAST MODIFIED BY	TYPE
<a href="#">New Special Note</a>	<input checked="" type="checkbox"/>		<a href="#">Sharon Keren Test10</a>	Prof Service ▼

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 Click in the **Quote Special Note** field to search the Quote Notes Library for the note you want to add to the Quote.

Quote Special Note

new

**Quote Notes Library**  
1 Result

NOTES NAME	ACTIVE	DESCRIPTION	LAST MODIFIED BY	TYPE
<a href="#">New Special Note</a>	<input checked="" type="checkbox"/>		<a href="#">Sharon Keren Test10</a>	Prof Service

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

StrataVAR PqW

Quote QT-000000155

**Details**

Quote Type	Account
Quote Number QT-000000155	Contact
Quote Name abcd	Sales Engineer
Quote Name Suffix	Quote Auto Number QT-000000155
Quote Version 2	Import Statistics
Opportunity <a href="#">abcd</a>	BolM Source
<a href="#">New Special Note</a>	Price List Code
Customer Note 1	Purchase Order Date
Customer Note 2	Validity Start Date
Customer Note 3	Frozen

**Activity**

New Event New Task Log a Call Email

Set up an event... Add

Filters: All time • All activities • All types

Refresh Expand All View All

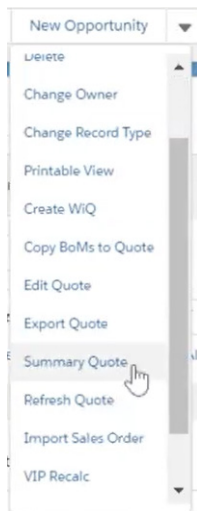
**Upcoming & Overdue**

No next steps.  
To get things moving, add a task or set up a meeting.

No past activity.  
Past meetings and tasks marked as done show up here.

## 4.4.2 Quote Details Buttons

StrataVAR PQW provides the following special buttons in the **Quote Details** tab —



### Copy BoMs to Quote Button

Copies BoMs to an existing Quote. See page 54 for details.

### Edit Quote Button

Edits an existing Quote, as described on page 98.

### Export Quote Button

Exports a Quote, as described in *Chapter 6, Exporting a Quote* on page 125.

### Summary Quote Button

Creates a summary Quote, as described on page 100.

### Refresh Quote Button

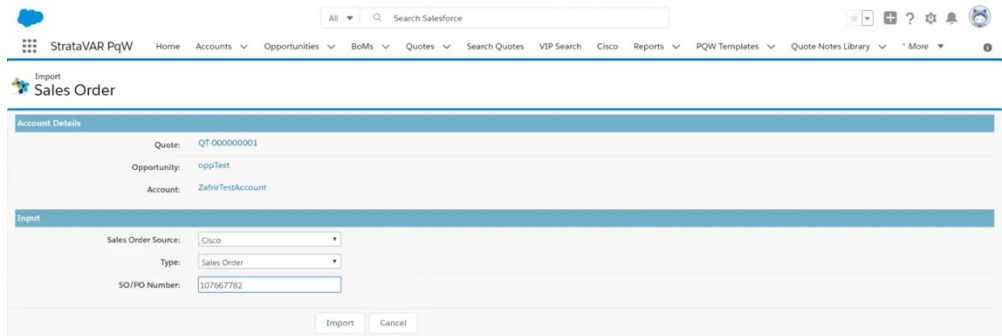
Refreshes a Quote. For more detail, see *Chapter 7, Refresh Options* on page 131.

### Import Sales Order Button

This option enables you to check the status of a sales reservation. Use this option after you have given a Quote to a customer, and then want to check the status of the reservation for that Quote.

## ► To import a sales order –

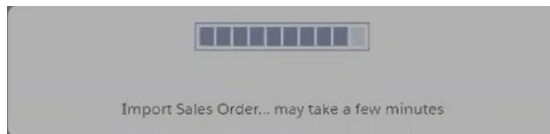
- 1 In the **Quote Details** tab, select **Import Sales Order**. The following displays –



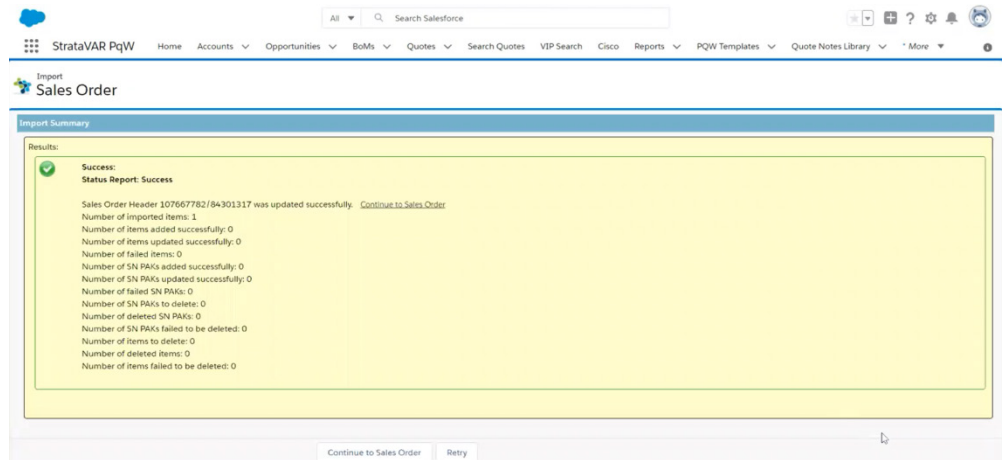
The screenshot shows the 'Import Sales Order' interface in the StrataVAR PqW application. At the top, there is a navigation bar with the StrataVAR PqW logo and a search bar. Below the navigation bar, the 'Import Sales Order' title is displayed. The form is divided into two main sections: 'Account Details' and 'Input'. The 'Account Details' section contains fields for 'Quote' (QT-000000001), 'Opportunity' (oppTest), and 'Account' (ZafraTestAccount). The 'Input' section contains fields for 'Sales Order Source' (Cisco), 'Type' (Sales Order), and 'SO/PO Number' (107667782). At the bottom of the form, there are 'Import' and 'Cancel' buttons.

The Account Details area shows the details for the Quote of interest.

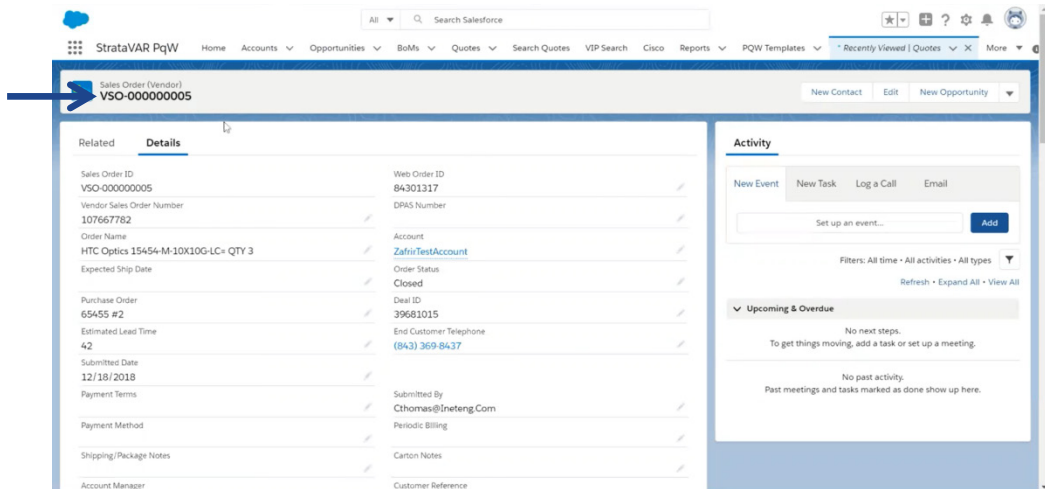
- 2 In the Input area, fill in the following fields –
  - **Sales Order Source** – Select the source of the sales order in the dropdown list. Possible values are **Cisco** and **Ingram**.
  - **Type** – Specify the type, which can be **Sales Order**, **Purchase Order** or **Web Order ID**.
  - **SO/PO Number** – Specify the number of the Sales Order or Purchase Order.
- 3 Click **Import**. A message displays while the import process is in progress. The import process may take several minutes to complete.



At the end of the import process, the following displays –

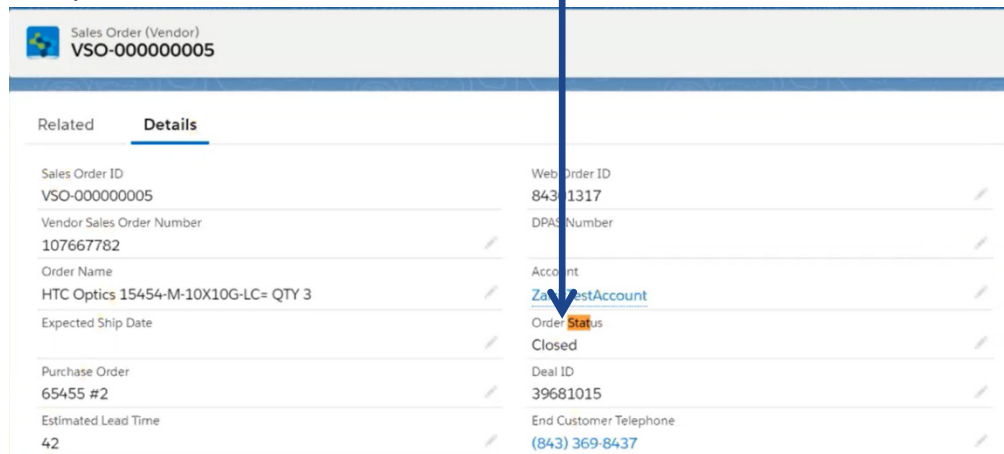


4 Click **Continue to Sales Order** to view the sales order. The following displays –



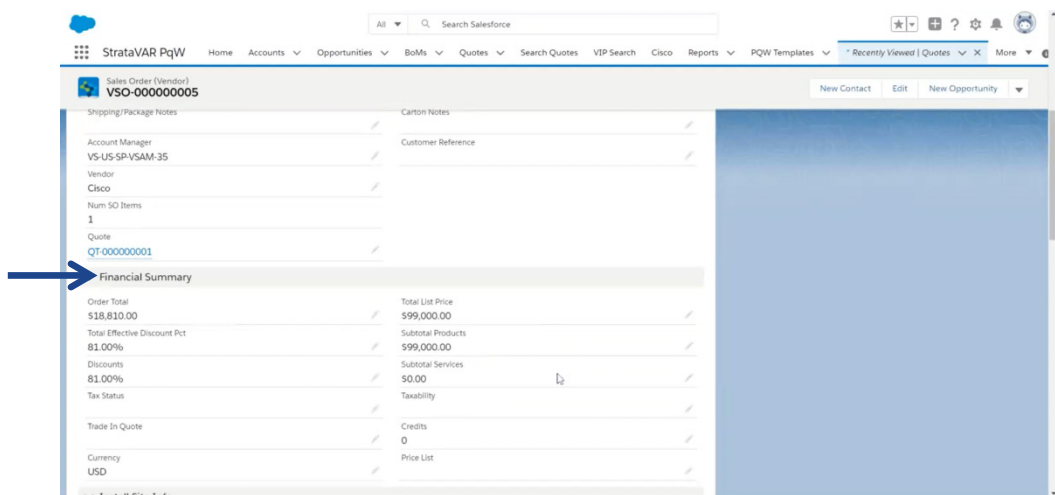
The sales order ID displays at the top of the window.

You may want to check the **Order Status** to see whether the customer received all expected items (Closed status).



Sales Order (Vendor) VSO-000000005	
<b>Related</b> <b>Details</b>	
Sales Order ID VSO-000000005	Web Order ID 8431317
Vendor Sales Order Number 107667782	DPAS Number
Order Name HTC Optics 15454-M-10X10G-LC= QTY 3	Account <a href="#">Zach West Account</a>
Expected Ship Date	Order Status <b>Closed</b>
Purchase Order 65455 #2	Deal ID 39681015
Estimated Lead Time 42	End Customer Telephone (843) 369-8437

You can scroll down to view the financial details for the sales order, as shown below –



StrataVAR PqW Home Accounts Opportunities BioMs Quotes Search Quotes VIP Search Cisco Reports PqW Templates Recently Viewed | Quotes X More

Sales Order (Vendor)  
VSO-000000005

Shipping/Package Notes Carton Notes

Account Manager  
VS-US-SP-VSAM-35

Customer Reference

Vendor  
Cisco

Num SO Items  
1

Quote  
[QT-000000001](#)

**Financial Summary**

Order Total \$18,810.00	Total List Price \$99,000.00
Total Effective Discount Pct 81.00%	Subtotal Products \$99,000.00
Discounts 81.00%	Subtotal Services \$0.00
Tax Status	Taxability
Trade In Quote	Credits 0
Currency USD	Price List

A sales order can be refreshed by any user. To do so, select **Refresh Sales Order** in the **Quote Details** tab dropdown list on the far right.

## VIP Recalc Button

This option recalculates the discount received from Cisco for a specific Quote. As such, you must specify details about the relevant VIP program in order to apply and receive the applicable discount.

Use the **VIP Recalc** button to recalculate the VIP on one or more Quotes simultaneously using a filtering mechanism. For example, let's say that VIP 34 expired on January 27 and that thereafter VIP 35 was rolled out. However, some users did not configure their VIP 35 settings, and therefore all the Quotes that they created from January 28 and forward have incorrect VIP rebate values (0%). Having to fix this issue for hundreds of Quotes individually is tiresome and time consuming. To simplify correcting this issue, you can filter Quotes by date in the VIP Recalc window, select the specific ones for which VIP needs to be recalculated and then apply the correct VIP (35 in this case) directly from this window to all Quotes simultaneously.

► **To perform a VIP recalculation –**

- 1 In the **Quote Details** tab, click the **VIP recalculation** link.

The screenshot shows the StrataVAR PqW web interface. At the top, there's a navigation bar with 'StrataVAR PqW' and tabs for 'Home', 'Accounts', 'Opportunities', 'BoMs', and 'Quotes'. Below the navigation bar, there's a form with several sections: 'Client Information' (Client Id, Client Secret, Grant Type, Uniq Org), 'SMARTnet Settings' (Email Service Email), 'StrataVAR Scheduler Manager' (Limit of Batch Concurrent Jobs, Max Number of Org Jobs, Start/Stop Batch Scheduler buttons), and 'Sales Order Auto Refresh' (Running User, Interval, First Run At, Start/Stop Sales Order Refresh buttons). At the bottom, there's a 'Vip Recalculation' section with a link labeled 'Vip recalculation' and a 'Next' button. A blue arrow points to the 'Vip recalculation' link.



The following displays –

- 2 Click the **Filter Quotes** button to define the Quote filters and then specify the filters, as follows –
  - **VIP Program** – Select the applicable VIP program. The VIP program in which you participate is provided to you by Cisco.
  - **Opportunity Status** – Select the applicable Opportunity status or **Any** for all statuses.
  - **Opportunity Close Date From/Opportunity Close Date To** – Specify the from/to dates for the Opportunity to be reflected in the VIP calculation. These dates affect the pricing for the discount. Each Opportunity has a close date. For the VIP calculation to be applied, the Opportunity's close date must fall between the dates that you specify here.
  - **Quote Status** – Select the applicable Quote status or **Any** for all statuses.
  - **Quote VIP Effective Date From/Quote VIP Effective Date To** – VIP rebates vary by date. For example, the same part number may have different rebate percentages for VIP 33 and VIP 34. The VIP effective date is used to determine which VIP version (33, 34, 35 and so on) is applied for the relevant Quote. By default, this value is set to the Quote Creation date (the date when the Quote was first created in the system). Changing this date triggers a VIP recalculation for that individual Quote.

- Click **Apply**. The table at the bottom of the window shows the Quotes matching the specified filter criteria.

**Filtering records**

**VIP Recalc**

Filter Quotes Clear Filter Apply

VIP Program: VIP3

Opportunity Status: Any

Opportunity Close Date from: 27/01/2019 Opportunity Close Date Till: 27/07/2019

Quote Status: Any

Quote VIP Effective Date From: 01/01/2019 Quote VIP Effective Date Till: 22/12/2019

Quote Number	VIP Effective Date	Name	Account ID	VAR Total Cost	Total Customer Extended Price
1	06/03/2019	DocTest	ZafirTestAccount	271,150.75	1,356,525.00
2	06/03/2019	DocTest	ZafirTestAccount	1,356,525.00	1,356,525.00
3	03/30/2019	DocTest	DocTest	2,479,823.10	3,989,357.40
4	03/30/2019	DocTest	DocTest	0.00	0.00
5	03/30/2019	DocTest	DocTest	0.00	0.00
6	03/30/2019	DocTest	DocTest	2,833,318.96	4,830,633.96
7	03/30/2019	DocTest	DocTest	2,479,823.10	3,989,357.40
8	03/30/2019	DocTest	DocTest	59,320.16	66,080.00
9	03/31/2019	Staticcast	Account_Refresh	65,753.16	97,680.00

Note that the **VAR Total Cost** and **Total Customer Extended Price** values change according to the **VIP Program** selected in step 2.

If needed, you can click a Quote in the list to change its VIP. To do so, simply click the Quote in the list, change the VIP in the **VIP Program** field and click **Apply**. An *Updating VIP* message displays while this change is in process, as shown below –

**Updating VIP**

**VIP Recalc**

Filter Quotes Clear Filter Apply

VIP Program: VIP24

Opportunity Status: Any

Opportunity Close Date from: 28/07/2019 Opportunity Close Date Till: 25/01/2020

Quote Status: Any

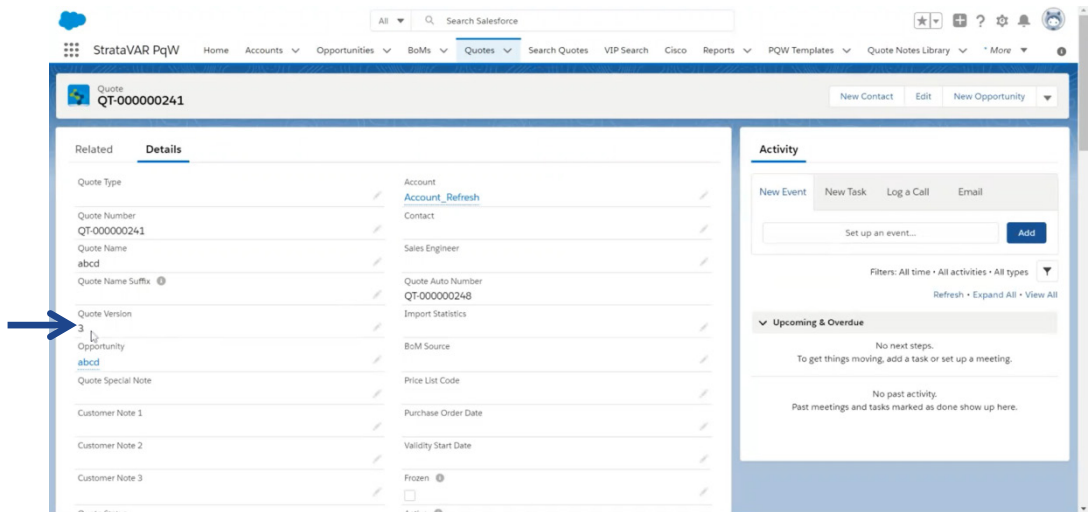
Quote VIP Effective Date From: 01/01/2019 Quote VIP Effective Date Till: 22/12/2019

Quote Number	VIP Effective Date	Name	Account ID	VAR Total Cost	Total Customer Extended Price
1	06/03/2019	DocTest	ZafirTestAccount	271,150.75	1,356,525.00
2	06/03/2019	DocTest	ZafirTestAccount	1,356,525.00	1,356,525.00

## Create New Version Button

This option enables you to create a new version for a standard Quote. New versions cannot be created for maintenance Quotes. You can create a new Quote version as needed. For example, if you already sent a Quote to a customer and the customer requires a change to that Quote, you can save a new, updated version of the Quote and then export it to send it to the customer. After a new version is created, its previous version cannot be changed. For example, after creating version 2, version 1 cannot be changed.

The current Quote version is shown in the Quote's details, as shown below –



## Save as New Quote Button

Creates and saves a copy (clone) of a Quote. The new Quote is assigned a new Quote ID. All other attributes for the new Quote are the same as those in the original Quote.

**Note** – You can edit the Quote ID assigned to a new Quote, although it is not recommended. For tracking, it is usually best to leave the Quote ID assigned by StrataVAR.

## 4.5 Selecting the BoMs to Be Included in the Quote

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

Selected BoMs: 1 BoM items selected: 57 (24 priced) BoM Source: Account BoMs (Sentinel Customer 1)

Opportunity: Sent Test

250

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

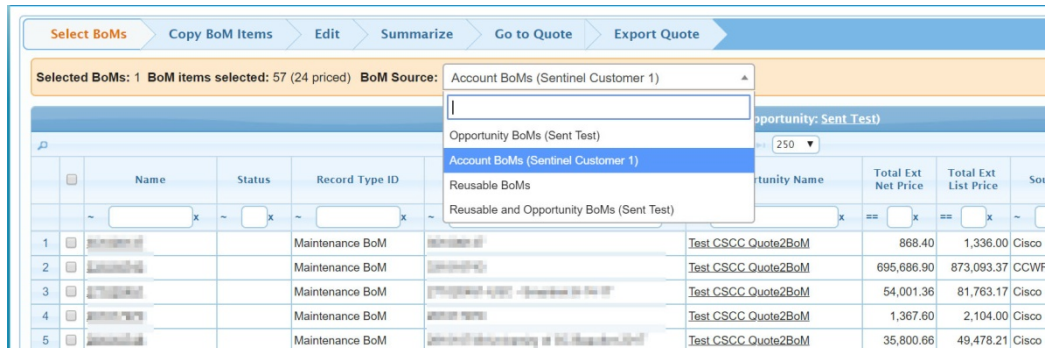
After you have imported BoM data from multiple sources (as described on page 39) and you have created and defined a Quote (as described starting on page 70), you must select the BoMs (as described below). These are the BoMs that contain items that you will later select to be included in the Quote (in the next step on page 93) –

- 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 42 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 42), 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.

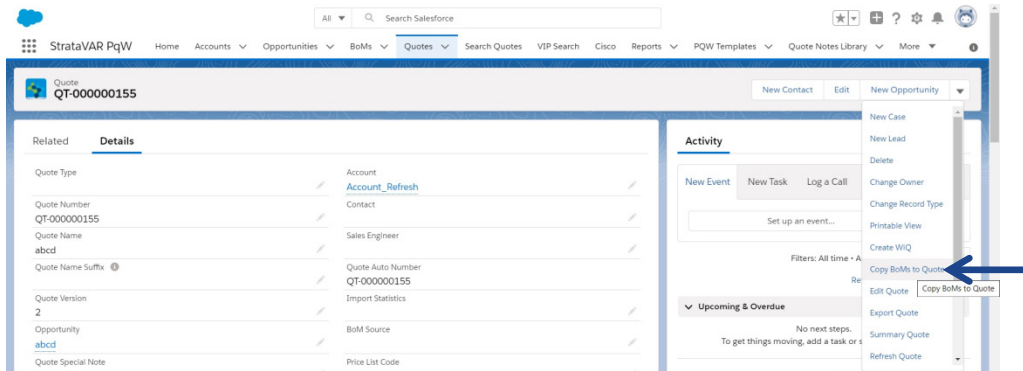
The following describes how to select a single BoM and then the items to be included in the Quote.

## 4.5.2 Listing the BoMs for Selection

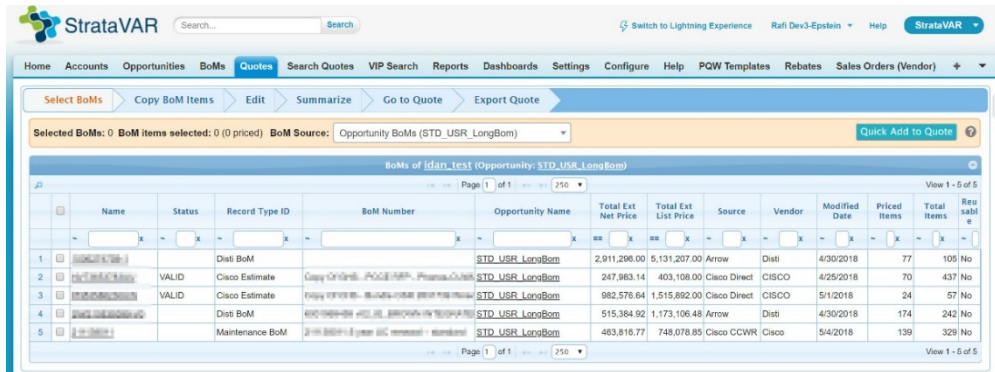
The following describes how to filter the list of BoMs to only show those that contain items that you would like to use for your Quote (which will be done in the next step on page 92).

### ► To list the BoMs for selection –

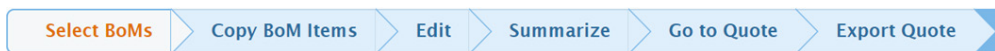
- 1 In the **Quote Details** page (shown on page 77), click the **Copy BoMs to Quote** button.



The following displays showing a list of BoMs –

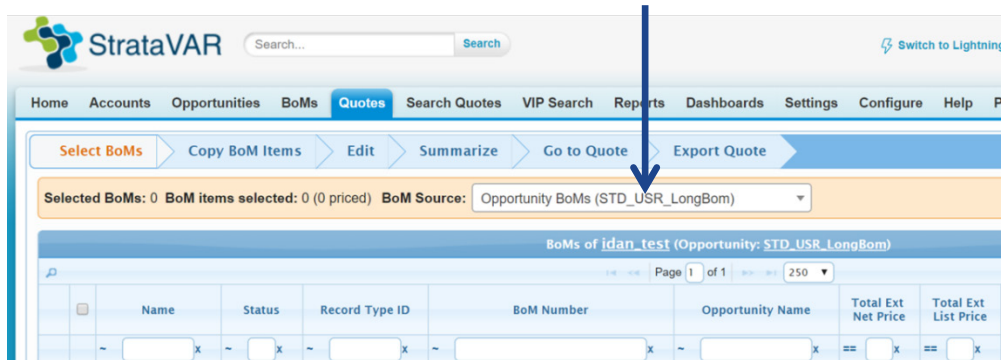


The top of this window lists the sequence of stages to be performed in order to generate a customer-facing Quote, as follows –

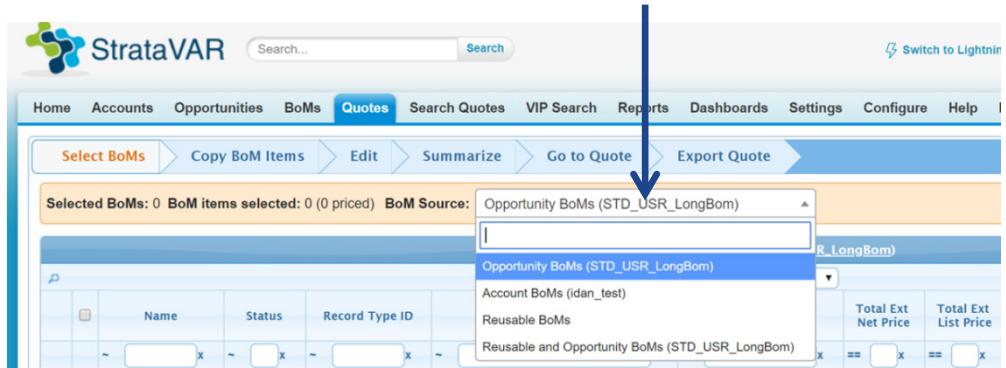


In general, these stages are to be performed from left to right; however, some are optional and you can repeat others. For example, if you already have a Quote open, you can go back and copy another BoM and its items to the Quote.

- 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.



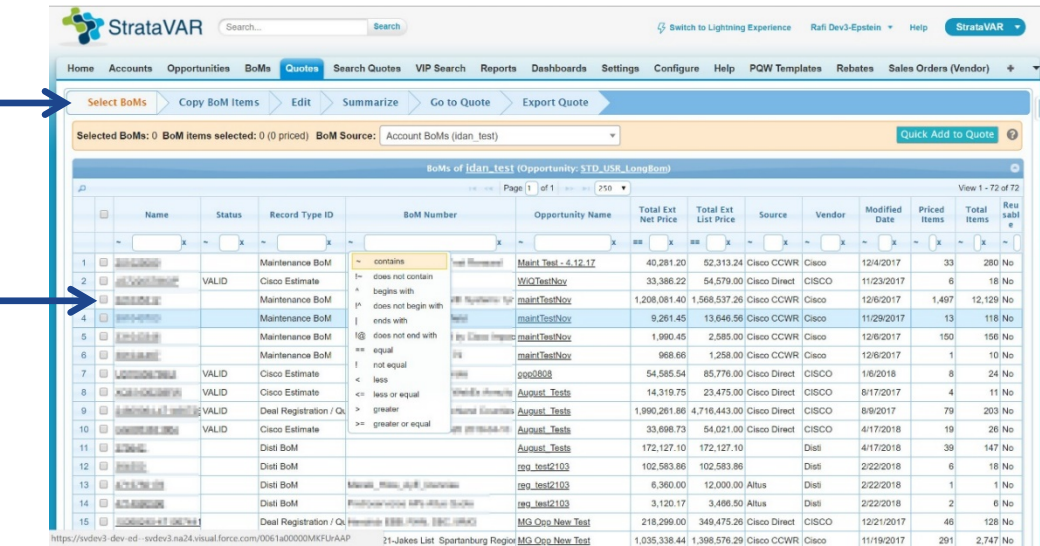
Name	Status	Record Type ID	BoM Number	Opportunity Name	Total Ext Net Price	Total Ext List Price	Source	Vendor	Modified Date	Priced Items	Total Items	Reusable
	X	X	X	X	X	X	X	X	X	X	X	X

### 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 93).

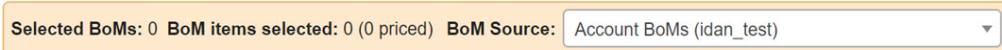
► **To select the BoMs to be included in the Quote –**

- 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.



The screenshot shows the StrataVAR interface with the 'Select BoMs' tab selected. A yellow summary bar at the top indicates 'Selected BoMs: 0 BoM items selected: 0 (0 priced) BoM Source: Account BoMs (idan\_test)'. Below the summary bar is a table of BoMs with columns: 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, and Reusable. The table lists 15 BoMs, including Maintenance BoM, Cisco Estimate, Deal Registration / Q, and Dist BoM. A blue arrow points to the 'Select BoMs' tab, and another blue arrow points to the 'Selected BoMs' summary bar.

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)



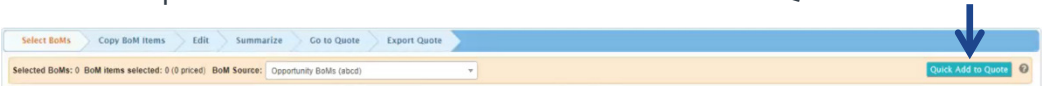
# 4.6 Selecting and Copying BoM Items into the Quote

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

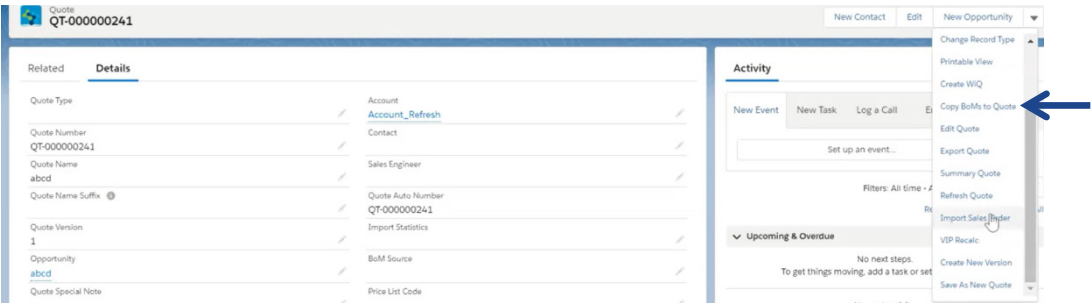
There are two ways to add the items of the selected BoMs to the Quote.

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** button in the dropdown list, as shown below –



The following displays –

**BoM Header**

**Boxes Containing Items**

**Item Inside a Box**

- 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 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 On On - Quote City: 22										1,515,892.00	35.18	982,576.64					
PN53588230	1...0	CAB-AC-C6K-TWLK=	Power Cord, 25	45.00	22	990.00	39.00	603.90	Cisco	QTITM-000	CAB-AC-C6K-T	45.00	22	990.00	39.00	27.45	603.90
PN53588230	2...0	GLC-SX-MMD=	Quote City: 50			25,000.00	39.00	15,250.00	Cisco	QTITM-000	GLC-SX-MMD=	500.00	50	25,000.00	39.00	305.00	15,250.00
PN53588230	2...0	GLC-SX-MMD=	1000BASE-SX	500.00	50	25,000.00	39.00	15,250.00	Cisco	QTITM-000	GLC-SX-MMD=	500.00	50	25,000.00	39.00	305.00	15,250.00
PN53588230	3...0	SFP-10G-LRM=	Quote City: 44			48,400.00	39.00	29,524.00	Cisco	QTITM-000	SFP-10G-LRM=	1,100.00	44	48,400.00	39.00	671.00	29,524.00
PN53588230	3...0	SFP-10G-LRM=	10GBASE-LRM	1,100.00	44	48,400.00	39.00	29,524.00	Cisco	QTITM-000	SFP-10G-LRM=	1,100.00	44	48,400.00	39.00	671.00	29,524.00
PN53588230	4...0	SFP-GE-S-RF	Quote City: 1			332.00	39.00	202.52	Cisco	QTITM-000	SFP-GE-S-RF	332.00	1	332.00	39.00	202.52	202.52
PN53588230	4...0	SFP-GE-S-RF	1000BASE-SX	332.00	1	332.00	39.00	202.52	Cisco	QTITM-000	SFP-GE-S-RF	332.00	1	332.00	39.00	202.52	202.52
PN53588230	5...0	WS-C4506E-S7L-98V+	Quote City: 8			406,976.00	25.36	303,684.80	Cisco	QTITM-000	WS-C4506E-S7L-98V+	18,000.00	8	144,000.00	0.75	17,865.00	142,920.00
PN53588230	5...0	WS-C4506E-S7	4506-E Chassis	18,000.00	8	144,000.00	0.75	142,920.00	Cisco	QTITM-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	Cisco	QTITM-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	Cisco	QTITM-000	C4K-SLOT-CVF	0.00	16	0.00	0.00	0.00	0.00
PN53588230	5...2	C4500E-LB-IPB	Len Base to IP	10,495.00	8	83,960.00	39.00	51,215.60	Cisco	QTITM-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	16,836.00	Cisco	QTITM-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	Cisco	QTITM-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

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-T	1	CAB-AC-C6K-T	Power Cord, 25'	45.00	22	990.00	39.00	603.90	Cisco	QTITM-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	QTITM-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	QTITM-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-S7-96V	5	WS-C4506E-S7	4506-E Chassis	18,000.00	8	144,000.00	0.75	142,920.00	Cisco	QTITM-000 WS-C4506E-S7	18,000.00	8	144,000.00	0.75	17,865.00	142,920.00	
CON-SNT-C45G	5.0.1	CON-SNT-C45G	SNTC-8X5XNB	1,092.00	8	8,736.00	35.00	5,678.40	Cisco	QTITM-000 CON-SNT-C45G	1,092.00	8	8,736.00	35.00	709.80	5,678.40	
C4K-SLOT-CVR	5.1	C4K-SLOT-CVR	Catalyst 4500 E	0.00	16	0.00	0.00	0.00	Cisco	QTITM-000 C4K-SLOT-CVR	0.00	16	0.00	0.00	0.00	0.00	
C4500E-LB-IPB	5.2	C4500E-LB-IPB	Line Base to IP	10,495.00	8	83,960.00	39.00	51,215.60	Cisco	QTITM-000 C4500E-LB-IPB	10,495.00	8	83,960.00	39.00	6,401.95	51,215.60	
C4500E-S6-UP	5.3	C4500E-S6-UP	WS-X4748-UP	3,450.00	8	27,600.00	39.00	16,836.00	Cisco	QTITM-000 C4500E-S6-UP	3,450.00	8	27,600.00	39.00	2,104.50	16,836.00	
WS-X45-SUP7L	5.4	WS-X45-SUP7L	Catalyst 4500 E	0.00	8	0.00	0.00	0.00	Cisco	QTITM-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.

The option to change a quantity only appears after you copy a specific row into 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.

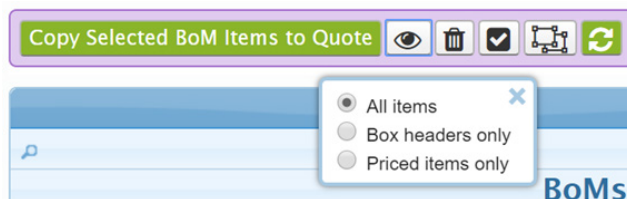
All the tasks described below copy items into the Quote. They do not affect the BoM itself. The BoM always remains the same as it was imported from the source.

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

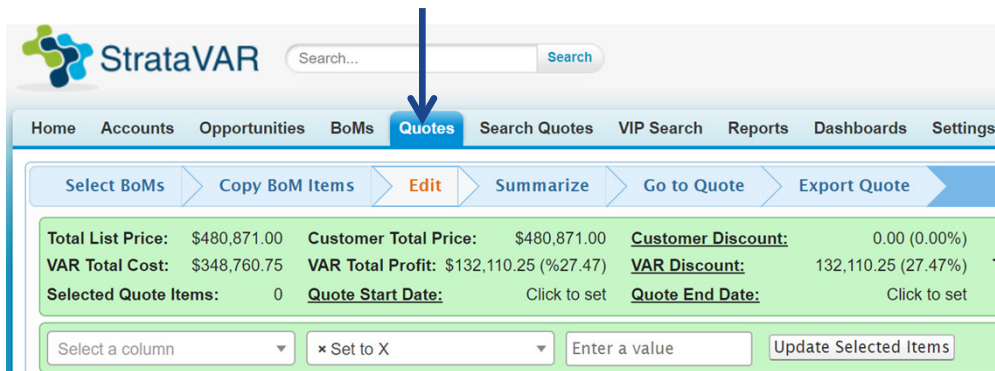
left side of the window, and then click the **Trash**  button. The BoM itself is not affected, but these items will be removed from the Quote on the right side of the window. These items will still be shown on the left side of the window.

# 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.

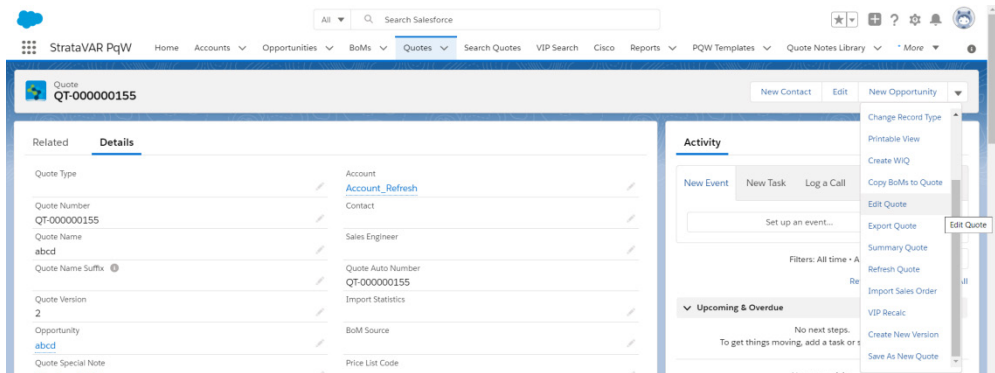
There are two ways to edit a Quote after it has been created and saved –

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



– 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 –





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

Quote Totals Summary

Pricing Operations

Item/Box Quote Items

StrataVAR

Search...

Switch to Lightning Experience

Raffi 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: 134,056.25 (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\_LongBom - STD\_USR\_LongBom (Account: idan\_test)

View 1 - 16 of 16

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	Cust Dsc (%)	Cust Unit Price	Cust Ext Price	Item Type	Unit	Vendor
...1 - CAB-AC-C8K-TWLK...	Qty: 11					495.00	39.00	301.95				193.05	0.00		495.00			
QTTM-000 CAB-AC-C8 Power Cord, 250Vac 16d	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			
QTTM-000 GLC-SX-MM 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	39.00	29,524.00				18,876.00	0.00		48,400.00			
QTTM-000 SFP-10G-LF 10GBASE-LRM SFP Mc	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-S7L+96V+	Qty: 8					406,976.00	25.38	303,684.80				103,291.20	0.00		406,976.00			
QTTM-000 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			
QTTM-000 CON-SNT-C SNTC-8X5XNBD 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			
QTTM-000 C4K-SLOT-C Catalyst 4500 E-Series f	0.00	16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Hardware		Cisco
QTTM-000 C4500E-LB-Lan Base to IP Base lic	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			
QTTM-000 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			

In this window, the **Quote Start Date** and **Quote End Date** relate to services. If you change the **Set Items Duration**, as shown below, note that the prices for all **Service Item Types** change accordingly, based on the defined duration.

StrataVAR PQW

Home

Accounts

Opportunities

BoMs

Quotes

Search Quotes

VIP Search

Cisco

Reports

PQW Templates

Quote Notes Library

More

Total List Price: \$1,017,564.94

Cust. Total Price: \$1,059,482.93

Customer Discount: \$558,082.01 (54.50%)

VAR Total Cost: \$741,731.11

VAR Total Profit: \$317,751.82 (29.99%)

VAR Discount: \$317,751.82 (29.99%)

Total Profit + VIP: \$317,751.82 (29.99%)

Selected Quote Items: 13

Quote Start Date: 2019-12-22

Quote End Date: 2020-12-22

Select a column

Set to X

Enter a value

Update Selected Items

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	Cust Dsc (%)	Cust Unit Price	Cust Ext Price	Item Type	Unit	Vendor
QTTM-0000023 GLC-SX-MM=	1000BASE-SX SFP transceiver mod	500.00	50	25,000.00	55.00	11,250.00	30.77	44.44	100.00	5,000.00	35.00	325.00	16,250.00	Hardware		Cisco		
...3 - SFP-10G-LRM...	Qty: 44																	
QTTM-0000023 SFP-10G-LRM=	100BASE-LRM SFP Module																	
...5 - WS-C4506E-S7L+96V+	Qty: 10																	
QTTM-0000023 WS-C4506E-S7L+4506-E Chassis, two WS-X4548-R																		
QTTM-0000023 CON-SNT-C4506E-SNTC-8X5XNBD 4506-E Chassis																		
QTTM-0000023 C4K-SLOT-CVR-E Catalyst 4500 E-Series Family Slot																		
QTTM-0000023 C4500E-LB-IPB	Lan Base to IP Base license	10,495.00	10	104,950.00	55.00	47,227.50	30.77	44.44	2,099.00	20,990.00	35.00	6,821.75	68,217.50	Hardware		Cisco		
QTTM-0000023 C4500E-S6-UPOE	WS-X4748-UPOE+E Upgrade for bu	3,450.00	10	34,500.00	55.00	15,525.00	30.77	44.44	680.00	6,800.00	35.00	2,242.50	22,425.00	Hardware		Cisco		

Set Selected Item Duration

Start Date: 12/22/2019

End Date: 12/22/2021

2.0027397260 years (2 years 1 day)

Apply

Cancel

## 4.10 Summary Quotes

This stage enables you to create a summary Quote. A summary Quote represents a grouping of BoM items that appear as a single line in a Quote. You can group BoMs together using any criteria that you like. A *package* represents such a grouping of BoMs. You can manually specify the BoMs to include in a summary Quote or create a summary Quote automatically. To automatically create a summary Quote, all BoM items must be assigned to a package.

Each dark blue row represents a package (BoM items group). The rows beneath the dark blue lines represent the individual BoM items in the package.

## Package BoMs and BoM Items

[illegible]

Each blue (package) row shows the **Total List Price** and **Total VAR Cost** for that package.

Quote | Salesforce | Edit Quote | Salesforce | Login | Salesforce | Login | Salesforce | Login | Salesforce | Login | Salesforce | +

sv-stv10.lightning.force.com/one/one.app?app=021w2b2Z8WY0u3umJ6vYw...GFOYmBIaWY...cmlsD0BjY29hZG9yZDZlR04HMjY0d1R0Zm90X2NMTA1XN0cmF0YXh0c3Yt...

StrataVR PqW Home Accounts Opportunities BoMs Quotes Search Quotes VIP Search Cisco Reports PQW Templates Quote Notes Library More

Select BoMs Copy BoM Items Edit Summarize Go to Quote

Total List Price: \$1,663,520.04 Cust. Total Price: \$1,007,403.23 Customer Discount: \$566,127.81 (34.03%)  
 VAR Total Price: \$776,204.11 VAR Total Profit: \$321,199.12 (29.27%) VAR Discount: \$321,199.12 (29.27%) Total Profit + VIP: \$321,199.12 (29.27%)  
 Selected Quote Items: 0

Set Package Select or enter a package name Update Selected Items

Quote: QT-000000027 - 27 - Test - Test (Account: Dor account)

Name	Part Number	Description	List Price/MRC	Term	Qty	Total Price	VAR Cost	VAR Profit	VAR Margin	VAR Total Profit	Cust Disc	Cost Price	Item Type	Unit	Vendor	BoM Line Number
One Big Package - Qty: 1						1,663,520.04	53.34	776,204.11		321,199.12	34.03	1,007,403.23				
CAB-AC-C66-TWLX						1,125.00	56.00	569.25		225.00	36.00	731.25				
GLC-SX-4MMD						26,900.00	56.00	11,250.00		5,000.00	36.00	16,250.00			Cisco	1.0
QT1TM-000023-CLC-SX-4MMD	1000BASE-SX SFP Transceiver mod.		500.00		50	25,000.00	56.00	11,250.00	30.77	100.00	5,000.00	35.00	16,250.00	Hardware		2.0
SFP-10G-LRM						46,400.00	56.00	21,780.00		3,080.00	36.00	31,400.00				
QT1TM-000023-SFP-10G-LRM	100BASE-LRM SFP Module		1,100.00		44	48,400.00	56.00	21,780.00	30.77	220.00	9,600.00	35.00	31,400.00	Hardware	Cisco	3.0
WS-C4986-57L-86V						519,668.90	53.34	240,412.40		101,200.30	34.26	341,612.70				
QT1TM-000023-WS-C4986-57L-86V	4500-E Chassis, 1x WS-X4546-RJ45		18,000.00		10	180,000.00	55.00	81,000.00	30.77	3,800.00	36,000.00	35.00	117,000.00	Hardware	Cisco	5.0
QT1TM-000023-CON-SNT-AC4506-SNT-8X360MD	4500-E Chassis		2,106.99		10	21,869.90	25.00	16,402.40	9.09	154.03	1,640.30	17.50	18,042.70	Service		5.0.1
QT1TM-000023-CLC-SX-4MMD	Catalyst 4500-E Series Family SFP		0.00		20	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Hardware	Cisco	5.1
QT1TM-000023-4500E-LB-PIB	Line Base to 2 Phase Items		10,496.00		10	104,960.00	56.00	47,227.50	30.77	2,099.00	20,990.00	35.00	68,217.50	Hardware		5.2
QT1TM-000023-4500E-S6-UPD-E	WS-X4748-UPD-E Upgrade for bu		3,450.00		10	34,500.00	56.00	15,525.00	30.77	660.00	6,600.00	35.00	22,425.00	Hardware		5.3
QT1TM-000023-WS-X45-SUPPL-E	Catalyst 4500-E Series Supervisor L		0.00		10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Hardware	Cisco	5.4



Each Quote can only have one summary Quote. You cannot modify an existing summary Quote. To change a summary Quote, you must first delete (cancel) the existing summary Quote and then create a new one. To do so, use the **Cancel Summary Quote** button, as shown below –



- 1 Select the Quotes **Summarize** tab.
- 2 Select the BoMs and/or BoM items for the Quote by selecting the checkbox of the row(s) to be included in the Quote summary.

StrataVAR PqW

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Opportunities

BoMs

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Cisco

Reports

PQW Templates

Quote Notes Library

Settings

Configure

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Select BoMs

Copy BoM Items

Edit

Summarize

Go to Quote

Est List Price:

\$3,909,357.40

Cust. Total Price:

\$3,909,357.40

Customer Discount:

\$0.00 (0.00%)

VAR Total Cost:

\$2,479,823.10

VAR Total Profit:

\$1,509,534.30 (37.84%)

VAR Discount:

\$1,509,534.30 (37.84%)

Total Profit - VIP:

\$1,607,480.30 (40.29%)

Selected Quote Items:

53

No Package

Select or enter a package name

Update Selected Items

Owner: QT-000000741\_abcde Account: Account\_RetInfo

Page 1 of 3

Rows: 20

View 1 - 20 of 53

Name	Part Number	Description	List Price/MRC	Term (Mo)	Qty	Total List Price	VAR Disc (%)	VAR Total Cost	VAR Disc (%)	VAR Unit Margin	VAR Total Profit	Cost Est Price	Item Type	Unit	Vendor	BoM Line Number
<input checked="" type="checkbox"/> No Package						3,909,357.40	37.84	2,479,823.10			1,509,534.30	0.00				
<input checked="" type="checkbox"/> CAB-AC-CRK-TWL-X						8,749.50	40.00	5,250.00			3,499.50	0.00				
<input checked="" type="checkbox"/> QLTM-000000000-CAB-AC-CRK-TWL-X-Power Cord, 250VAC 16A, first lock NEMA I	58.33	150	8,749.50	40.00	5,250.00	40.00	23.33	3,499.50	0.00		8,749.50 Hardware	Cisco	-1.0			
<input checked="" type="checkbox"/> GLC-SX-MM-D						17,500.00	15.00	14,875.00			2,625.00	0.00				
<input checked="" type="checkbox"/> QLTM-000000000-GLC-SX-MMD-V	100BASE-SX SFP transceiver module, MN	500.00	35	17,500.00	15.00	14,875.00	15.00	75.00	2,625.00	0.00	17,500.00 Hardware	Cisco	-2.0			
<input checked="" type="checkbox"/> SFP-10G-LRM						30,900.00	42.00	31,900.00			23,100.00	0.00				
<input checked="" type="checkbox"/> QLTM-000000000-SFP-10G-LRM-V	100BASE-LRM SFP Module	1,100.00	50	55,800.00	42.00	31,900.00	42.00	402.00	23,100.00	0.00	55,800.00 Hardware	Cisco	-3.0			
<input checked="" type="checkbox"/> QLTM-000000000-SFP-GE-SF-V	100BASE-SX SFP (COM) REMANUFACT	332.96	50	16,600.00	42.00	9,628.00	42.00	139.44	8,972.00	0.00	16,600.00 Hardware	Cisco	-4.0			
<input checked="" type="checkbox"/> WS-C4506E-SXLIMB						2,542,948.00	36.38	1,625,426.00			921,000.00	0.00				
<input checked="" type="checkbox"/> QLTM-000000000-WS-C4506-E-SXLIMB-A595-E Chassis, non WS-X4648-RJ45-E-V	23.92	40	952,400.00	42.30	152,302.00	42.30	10,000.00	400,000.00	0.00		952,400.00 Hardware	Cisco	-5.0			
<input checked="" type="checkbox"/> QLTM-000000000-CON-STN-CA-0406S1L SYNC-EXTENSD 4506-E Chassis,non WS-X	3,278.00	40	131,940.00	10.00	117,936.00	10.00	327.60	13,104.00	0.00		131,940.00 Service	Cisco	-5.0.1			
<input checked="" type="checkbox"/> QLTM-000000000-CAK-LD-CVR-E Catalyst 4500-E-Series Family STB Cover	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00 Hardware	Cisco	-5.1			
<input checked="" type="checkbox"/> QLTM-000000000-C4506-E-B-PR Base Line to IP Base license	12,070.00	40	482,800.00	20.00	386,240.00	20.00	2,414.00	96,560.00	0.00		482,800.00 Software	Cisco	-5.2			
<input checked="" type="checkbox"/> QLTM-000000000-WS-X4748-UPOE-E WS-X4748-UPOE-E Upgrade for bundles E	3,450.00	40	138,000.00	42.00	80,040.00	42.00	1,449.00	57,960.00	0.00		138,000.00 Hardware	Cisco	-5.3			
<input checked="" type="checkbox"/> QLTM-000000000-WS-X456-SUPRT-E Catalyst 4500-E-Series Supervisor IE, 320x	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00 Hardware	Cisco	-5.4			
<input checked="" type="checkbox"/> QLTM-000000000-WS-X4748-UPOE-E Catalyst 4500E 48-Port UPOE 10/100/1000	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00 Hardware	Cisco	-5.5			
<input checked="" type="checkbox"/> QLTM-000000000-WS-X4748-UPOE-E Catalyst 4500E 48-Port UPOE 10/100/1000	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00 Hardware	Cisco	-5.6			
<input checked="" type="checkbox"/> QLTM-000000000-WS-X4748-UPOE-E Catalyst 4500E 48-Port UPOE 10/100/1000	11,410.00	40	456,400.00	42.00	264,712.00	42.00	4,792.00	191,680.00	0.00		456,400.00 Hardware	Cisco	-5.7			

3 In the **Set Package** field, enter a name for the package, as shown below –

The screenshot shows the StrataVAR PqW interface. At the top, there's a navigation bar with 'StrataVAR PqW' and various menu items like 'Home', 'Accounts', 'Opportunities', 'BoMs', 'Quotes', and 'Search Quotes'. Below this is a summary section with 'Total List Price: \$3,989,357.40', 'Cust. Total Price: \$3,989,357.40', 'Customer Discount: \$0.00', 'VAR Total Cost: \$2,479,823.10', 'VAR Total Profit: \$1,509,534.30 (37.84%)', and 'VAR Discount: \$1,509,534.30 (37.84%)'. The 'Selected Quote Items' count is 53. A blue arrow points to the 'Set Package' field, which has a dropdown menu open showing 'No Package', 'Maintenance', and 'Professional Services'. To the right of the dropdown is the 'Update Selected Items' button. Below this is a table of selected items with columns: Name, Description, List Price/MRC, Term (M), Qty, Total List Price, and VAR Disc (%).

Name	Description	List Price/MRC	Term (M)	Qty	Total List Price	VAR Disc (%)
<input checked="" type="checkbox"/> No Package					3,989,357.40	37.84
<input checked="" type="checkbox"/> CAB-AC-C6K-TWLK=		8,749.50		40.00		
<input checked="" type="checkbox"/> QTITM-00003690 CAB-AC-C6K-TWLK=	Power Cord, 250Vac 16A, twist lock NEMA	58.33		150	8,749.50	40.00
<input checked="" type="checkbox"/> GLC-SX-MMD=		17,500.00			15.00	
<input checked="" type="checkbox"/> QTITM-00003690 GLC-SX-MMD=	1000BASE-SX SFP transceiver module, MM	500.00		35	17,500.00	15.00
<input checked="" type="checkbox"/> SFP-10G-LRM=		55,000.00			42.00	
<input checked="" type="checkbox"/> QTITM-00003690 SFP-10G-LRM=	10GBASE-LRM SFP Module	1,100.00		50	55,000.00	42.00
<input checked="" type="checkbox"/> SFP-GE-S-RF		16,600.00			42.00	
<input checked="" type="checkbox"/> QTITM-00003690 SFP-GE-S-RF	1000BASE-SX SFP (DOM) REMANUFACT	332.00		50	16,600.00	42.00
<input checked="" type="checkbox"/> WS-C4506E-S7L+96V+		2,547,040.00			36.18	
<input checked="" type="checkbox"/> QTITM-00003690 WS-C4506E-S7L+96V+4506-E	Chassis, two WS-X4648-RJ45V+E,	23,810.00		40	952,400.00	42.00
<input checked="" type="checkbox"/> QTITM-00003690 CON-SNT-C4506STL	SNTC-8X5XNBD 4506-E Chassis,two WS-X	3,276.00		40	131,040.00	10.00

4 Click the adjacent **Update Selected Items** button. The following displays, in which you specify the details for the package –

The screenshot shows the 'Edit Package' form. At the top, there's a 'Package SKU' field with 'All Items' selected, a 'Quantity' field, and an 'Ignore Zero Priced' checkbox. Below this is a 'Package Description' field with a character limit of 255. At the bottom is a table of included BoMs with columns: Bolt Line Number, Part Number, Description, Qty Per Plug, List Price, and VAR Unit Cost. The table lists 5 items, including 'CAB-AC-C6K-TWLK= Power Cord, 250Vac 16A, twist lock NEMA L6-20 plug, US', 'GLC-SX-MMD= 1000BASE-SX SFP transceiver module, MMF, 850nm, DOM', 'SFP-10G-LRM= 10GBASE-LRM SFP Module', 'SFP-GE-S-RF 1000BASE-SX SFP (DOM) REMANUFACTURED', and 'WS-C4506E-S7L+96V+ 4506-E Chassis, two WS-X4648-RJ45V+E, Sup7L-E, LAN Base'.

Bolt Line Number	Part Number	Description	Qty Per Plug	List Price	VAR Unit Cost
1.0	CAB-AC-C6K-TWLK=	Power Cord, 250Vac 16A, twist lock NEMA L6-20 plug, US		58.33	35.00
2.0	GLC-SX-MMD=	1000BASE-SX SFP transceiver module, MMF, 850nm, DOM		500.00	425.00
3.0	SFP-10G-LRM=	10GBASE-LRM SFP Module		1,100.00	638.00
4.0	SFP-GE-S-RF	1000BASE-SX SFP (DOM) REMANUFACTURED		332.00	192.56
5.0	WS-C4506E-S7L+96V+	4506-E Chassis, two WS-X4648-RJ45V+E, Sup7L-E, LAN Base		23,810.00	13,809.80

The **Package SKU** field displays the name of the package that you specified in step 2.

The table lists the BoMs included in the package.

- 5 In the **Quantity** field, specify the quantity of the packaged items. For example, let's assume that you want to aggregate 4 items in 1 package. In this case, if you enter 2 in the **Quantity** field, it means that in the summary quote, you have 2 of each item in the package, or in this case a total of 8 items (4 items x 2 items per package = 8 items).
- 6 Check the **Ignore Zero Priced** checkbox if you want to exclude zero-price items from the Quote summary.
- 7 In the **Package Description** field, enter a description of the package.
- 8 Click the **Save** button.

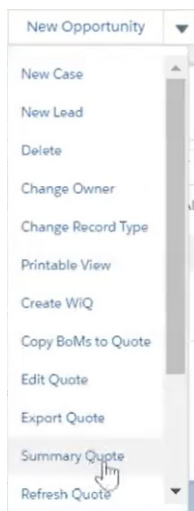
### 4.10.1 Automatic Summary Quotes

The packages that already exist in the **Summarize** tab are used as the basis to create an automatic summary Quote. See page 101 for details about how to create a package.

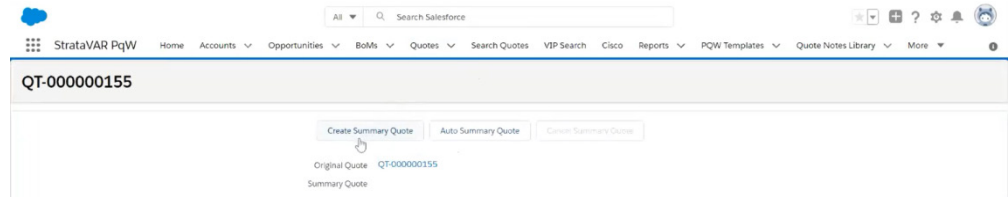
Alternatively, you can manually create a summary Quote, as described on page 105.

#### ► To automatically create a summary Quote –

- 1 Select **Summary Quote** in the dropdown menu.

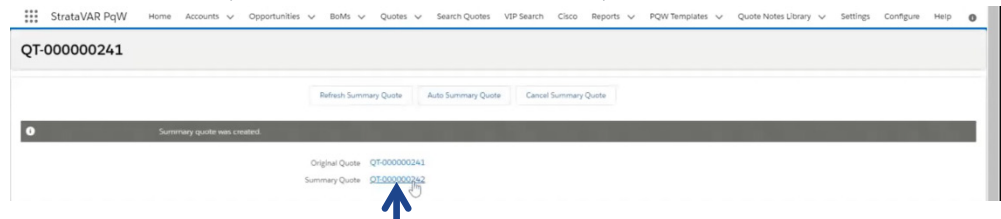


The following displays –

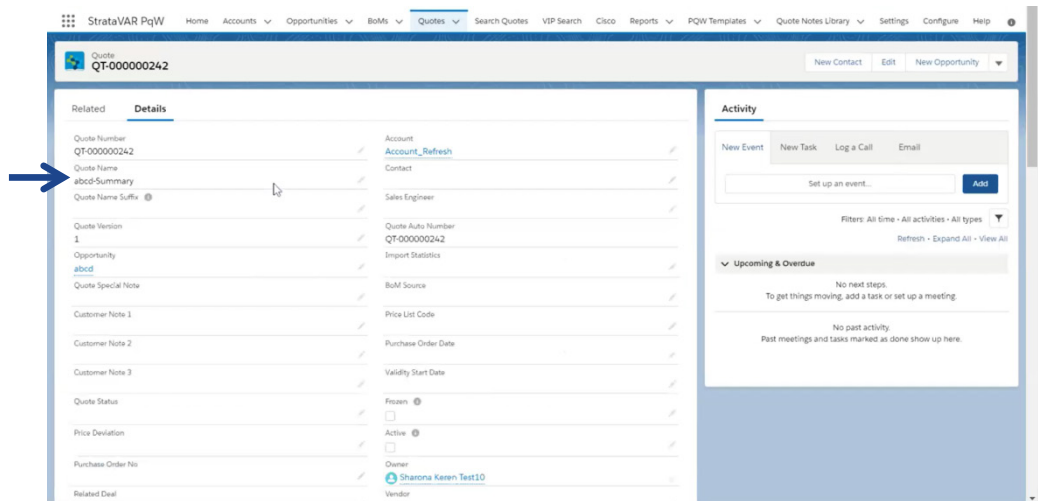


- 2 Click the **Auto Summary Quote** button. Selecting this option automatically creates a summary Quote, based on the packages that exist in the **Summarize** tab (see page 102).

Once the summary Quote is created, its ID displays in the window.



- 3 Click the summary Quote ID to view the details for the summary Quote.



The quote name for the summary Quote is the Opportunity name, with **-Summary** appended at the end. For example, **abcd-Summary**, as shown above.

The summary Quote also displays the original Quote ID, as shown below –

StrataVAR PqW Home Accounts Opportunities BoMs Quotes Search Quotes VIP Search Cisco Reports P

Quote QT-000000242

Price Deviation

Purchase Order No

Related Deal

Ship To Party

Co-Term Date

Begin Date

End Date

Original Quote QT-000000241

Total Quote Line Items 11

Comments

Solution Comments

Created By Sharona Keren Test10, 11/21/2019 1:54 AM

Last Modified By Sharona Keren Test10, 11/21/2019 1:54 AM

Review Account Special Instructions

Financials

Total Extended List Price

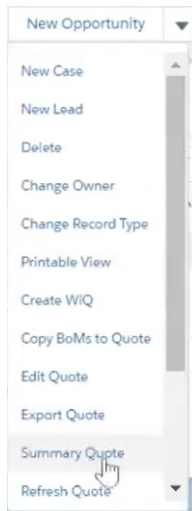
## 4.10.2 Manual Summary Quote

A manual summary Quote is similar to an automatic summary Quote, but enables you to redefine the package(s) to include in the Quote.

Before defining a manual summary Quote, you should first define the package(s) for the Quote, as described on page 101.

► **To manually define a summary Quote –**

- 1 Select **Edit Quote** in the dropdown menu.



- 2 In the Quote window, select the **Summarize** tab.

StrataVAR PQW Home Accounts Opportunities BoMs Quotes Search Quotes VIP Search Cisco Reports PQW Templates Quote Notes Library Settings Configure Help

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

Total List Price: \$53,923.45 Cust. Total Price: \$53,923.45 Customer Discount: \$0.00 (0.00%) Total Profit - VIP: \$3,789.22 (7.03%)  
 VAR Total Cost: \$56,134.23 VAR Total Profit: \$3,789.22 (7.03%) VAR Discount: \$3,789.22 (7.03%)

Selected Quote Items: 0

Set Package: Select or enter a package name Update Selected Items

Quote: Q1-000000254 - about about (Access: Access, Refresh)

Name	Part Number	Description	List Price/MSRP	Time (Hrs)	Qty	Total List Price	VAR Price (0)	VAR Total Cost	VAR Margin (0)	VAR Unit Margin	VAR Total Profit	Cost Est Price	Item Type	Unit	Vendor	BoM Line Number
<b>CPES-SS-PREMIUM-ADD</b> CPES-SS-PREMIUM-ADD Support - Direct Premium 7,956.25 2 15,912.50 \$3.51 14,794.34 7.03 556.06 1,116.16 0.00 15,912.50 Hardware 0000-0001-XL0015 CPES-SS-PREMIUM-ADD Support - Direct Premium 7,956.25 1 7,956.25 7.03 7,387.17 7.03 556.06 556.06 0.00 7,956.25 Hardware 0000-0002-XL0016 CPES-SS-PREMIUM-ADD Support - Direct Premium 829.69 1 829.69 7.03 771.36 7.03 56.31 56.31 0.00 829.69 Hardware 0000-0003-XL0017 CPES-SS-PREMIUM-ADD Support - Direct Premium 829.69 1 829.69 7.03 771.36 7.03 56.31 56.31 0.00 829.69 Hardware 0000-0004-XL0018 CPSS-NGTIP-5200-2Y Next Generation Threat Prevention Package subscription for 2 14,197.66 1 14,197.66 7.03 13,199.96 7.03 997.66 997.66 0.00 14,197.66 Hardware 0000-0005-XL0019 CPSS-NGTIP-5200-2Y Next Generation Threat Prevention Package subscription for 2 14,197.66 1 14,197.66 7.03 13,199.96 7.03 997.66 997.66 0.00 14,197.66 Hardware 0000-0006-XL0020																

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- 3 Select the checkbox of each Quote to be included in the summary Quote. For example, all Quotes were selected in the window below.

Summarize

Total List Price: \$53,923.45 Cust. Total Price: \$53,923.45 Customer Discount  
 VAR Total Cost: \$50,134.23 VAR Total Profit: \$3,789.22 (7.03%) VAR Discount:  
 Selected Quote Items: 6

Set Package - Select or enter a package name Update Selected Items

All

	Name	Part Number	Description
<input checked="" type="checkbox"/>	(0)		
<input checked="" type="checkbox"/>	CPES-SS-PREMIUM-ADD		
<input checked="" type="checkbox"/>	QTITM-000037847	CPES-SS-PREMIUM-ADD	Support - Direct Premium
<input checked="" type="checkbox"/>	QTITM-000037848	CPES-SS-PREMIUM-ADD	Support - Direct Premium
<input checked="" type="checkbox"/>	QTITM-000037849	CPES-SS-PREMIUM-ADD	Support - Direct Premium
<input checked="" type="checkbox"/>	QTITM-000037850	CPES-SS-PREMIUM-ADD	Support - Direct Premium
<input checked="" type="checkbox"/>	QTITM-000037851	CPES-NGTP-5200-2Y	Next Generation Threat Prevention Package subscription for 2
<input checked="" type="checkbox"/>	QTITM-000037852	CPES-NGTP-5200-2Y	Next Generation Threat Prevention Package subscription for 2

- 4 In the **Set Package** field, enter a package name. Then, click that package in the list of packages to confirm its selection.
- 5 Click the **Update Selected Items** button. The Edit Package window displays, which shows all the items included in the package. Each row in the table represents a different item.

Edit Package

Package SKU: All Quantity: 1 Ignore Zero Priced

Package Description: Characters left: 255

I

BoM Line Number	Part Number	Description	Qty Per Pkg	List Price	VAR Unit Cost
0000-0001-XL0015	CPES-SS-PREMIUM-ADD	Support - Direct Premium	2	7,955.25	7,387.17
0000-0002-XL0016	CPES-SS-PREMIUM-ADD	Support - Direct Premium	1	7,955.25	7,387.17
0000-0003-XL0017	CPES-SS-PREMIUM-ADD	Support - Direct Premium	1	829.69	771.38
0000-0004-XL0018	CPES-SS-PREMIUM-ADD	Support - Direct Premium	1	829.69	771.38
0000-0005-XL0019	CPES-NGTP-5200-2Y	Next Generation Threat Prevention Package subscription for 2 year for 5200 Appliance	1	14,197.86	13,199.98

Save Cancel

- 6 In the **Package Description** field, enter a description of the package.
- 7 Click the **Save** button in the Edit Package window.

8 In the **Summarize** tab, click the **Save** button.

The screenshot shows the StrataVAR PqW interface with the 'Summarize' tab selected. The top navigation bar includes 'Home', 'Accounts', 'Opportunities', 'BoMs', 'Quotes', 'Search Quotes', 'VIP Search', 'Cisco', 'Reports', 'PQW Templates', 'Quote Notes Library', 'Settings', 'Configure', and 'Help'. The 'Summarize' tab is highlighted in the top menu. Below the menu, there's a summary section with fields for 'Total List Price', 'VAR Total Cost', 'Selected Quote Items', 'Customer Discount', 'VAR Discount', and 'Total Profit - VIP'. A blue arrow points to the 'Save' button in the top right corner of the interface.

The following displays –

The screenshot shows the StrataVAR PqW interface with the 'Create Summary Quote' button highlighted. The top navigation bar is the same as in the previous screenshot. The main content area shows the 'QT-000000155' quote. Below the quote ID, there are three buttons: 'Create Summary Quote', 'Auto Summary Quote', and 'Cancel Summary Quote'. The 'Create Summary Quote' button is highlighted with a blue arrow. Below the buttons, there's a section for 'Original Quote' and 'Summary Quote'.

9 Click the **Create Summary Quote** button. Once the summary Quote is created, its ID displays in the window.

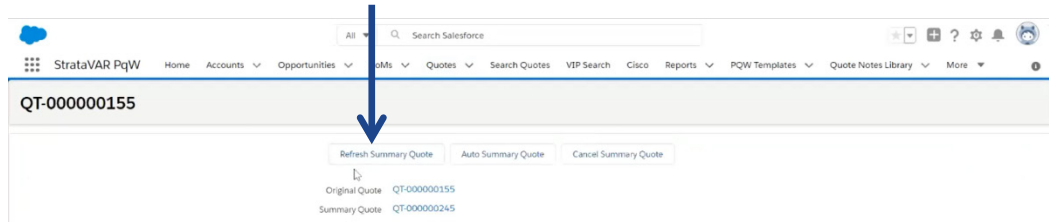
The screenshot shows the StrataVAR PqW interface after clicking the 'Create Summary Quote' button. The top navigation bar is the same. The main content area shows the 'QT-000000254' quote. Below the quote ID, there are three buttons: 'Refresh Summary Quote', 'Auto Summary Quote', and 'Cancel Summary Quote'. Below the buttons, there's a message 'Summary quote was created.' and a section for 'Original Quote' and 'Summary Quote'. The 'Summary Quote' ID is 'QT-000000257', which is highlighted with a blue arrow.



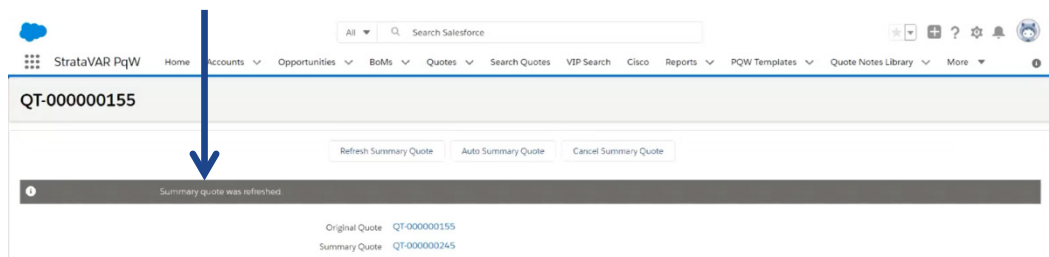
### 4.10.3 Refreshing a Summary Quote

If you make changes to the original Quote associated with a summary Quote, then you must manually refresh the summary Quote in order to update it accordingly. All identification information for the summary Quote remains the same, meaning the Quote ID and so on.

To do so, select the summary Quote and then click the **Refresh Summary Quote** button, as shown below –



A confirmation message displays inside a gray bar after refreshing the Quote –



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## 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

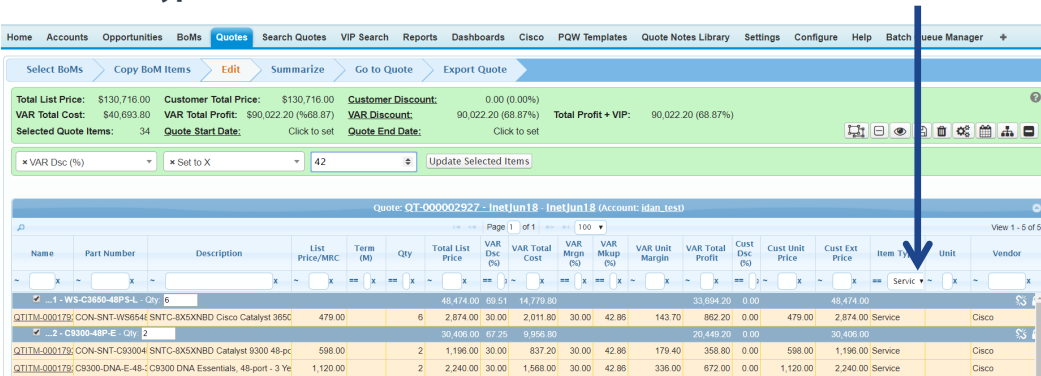
The **Pricing Operations** area of the Quote Editing window (shown below) provides a variety of column headers that enable you to adjust the values of all the displayed items at the same time. Only those columns in the **Search a column** box are editable.

## 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 –

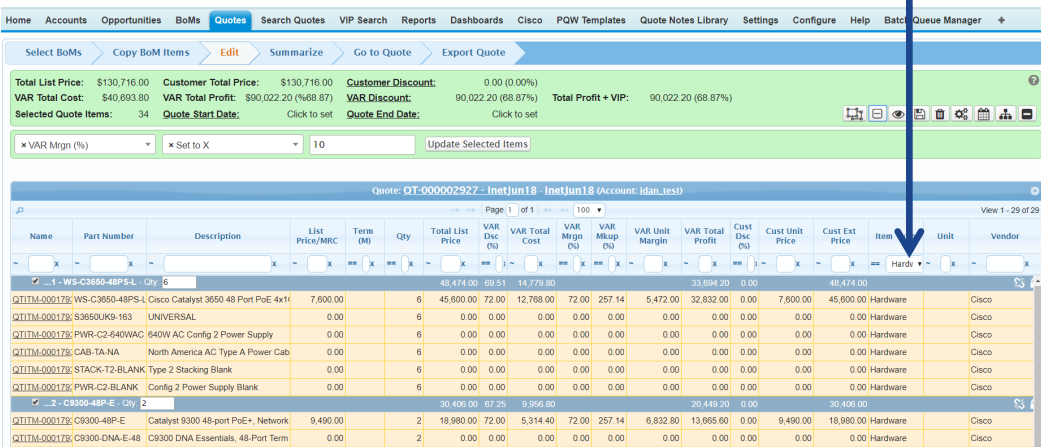


The screenshot shows the 'Quote Editing' window for Quote QT-000002927. The 'Item Type' column is set to 'Service'. A blue arrow points to the 'Service' dropdown in the 'Item Type' column header.

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 (%)	Cost Unit Price	Cost Ext Price	Item Type	Unit	Vendor
1 - WS-C3680-48PS-L	Qty: 6					48,474.00	69.51	14,779.80				33,694.20	0.00		48,474.00			
QTTTM-000178	CON-SNT-WS654E SNTC-8X5XNBD Cisco Catalyst 3650		479.00		6	2,874.00	30.00	2,011.80	30.00	42.86	143.70	862.20	0.00	479.00	2,874.00	Service		Cisco
2 - C9300-48P-E	Qty: 2					30,406.00	67.25	9,956.80				20,449.20	0.00		30,406.00			
QTTTM-000178	CON-SNT-C93004 SNTC-8X5XNBD Catalyst 9300 48-pc		598.00		2	1,196.00	30.00	837.20	30.00	42.86	179.40	358.80	0.00	598.00	1,196.00	Service		Cisco
QTTTM-000178	C9300-DNA-E-48-C9300 DNA Essentials, 48-port - 3 Yr		1,120.00		2	2,240.00	30.00	1,568.00	30.00	42.86	336.00	672.00	0.00	1,120.00	2,240.00	Service		Cisco

## 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%.



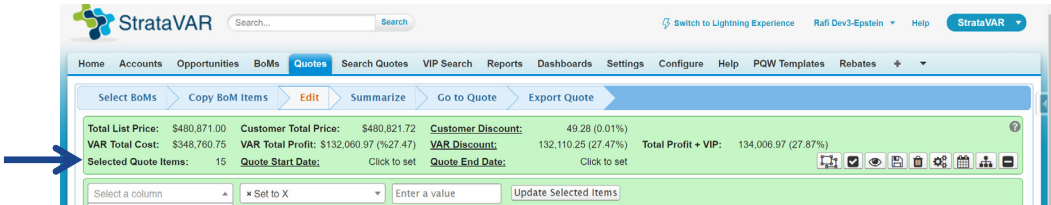
The screenshot shows the 'Quote Editing' window for Quote QT-000002927. The 'Item Type' column is set to 'Hardware'. A blue arrow points to the 'Hardware' dropdown in the 'Item Type' column header.

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 (%)	Cost Unit Price	Cost Ext Price	Item Type	Unit	Vendor
1 - WS-C3680-48PS-L	Qty: 6					48,474.00	69.51	14,779.80				33,694.20	0.00		48,474.00			
QTTTM-000178	WS-C3650-48PS-L	Cisco Catalyst 3650 48 Port PoE 4x1	7,600.00		6	45,600.00	72.00	12,768.00	72.00	257.14	5,472.00	32,832.00	0.00	7,600.00	45,600.00	Hardware		Cisco
QTTTM-000178	S3650U9-163	UNIVERSAL	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
QTTTM-000178	PWR-C2-640WAC	640W 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	0.00	Hardware		Cisco
QTTTM-000178	CAB-TA-NA	North America AC 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	0.00	Hardware		Cisco
QTTTM-000178	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	0.00	Hardware		Cisco
QTTTM-000178	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	0.00	Hardware		Cisco
2 - C9300-48P-E	Qty: 2					30,406.00	67.25	9,956.80				20,449.20	0.00		30,406.00			
QTTTM-000178	C9300-48P-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	13,665.60	0.00	9,490.00	18,980.00	Hardware		Cisco
QTTTM-000178	C9300-DNA-E-48	C9300 DNA Essentials, 48-Port Term	0.00		2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Hardware		Cisco



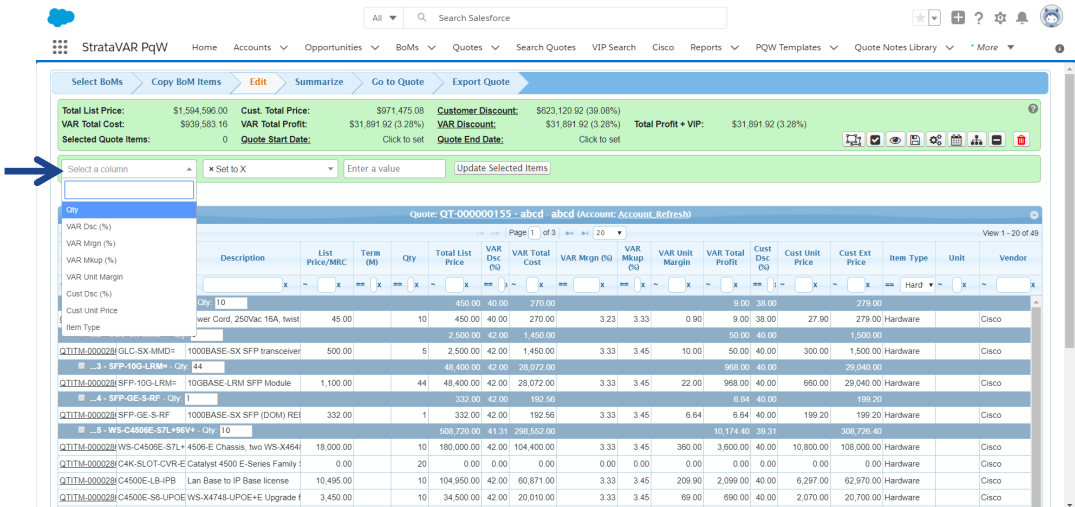
Click the **Select All**  button to select all the displayed items, meaning all the **Hardware** items or check the checkbox(es) of the item(s) you want to select.

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 'Quotes' tab in the StrataVAR PQQ 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, List Price, and various discount and profit percentages.

- **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 'Enter a value' field in the StrataVAR PQQ software. The dropdown menu for the 'VAR Dsc (%)' column is set to 'Set to X', and 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 interface with the 'Quotes' tab selected. The top summary bar displays the following values:

- Total List Price: \$480,871.00
- Customer Total Price: \$480,821.72
- Customer Discount: 49.28 (0.01%)
- VAR Total Cost: \$348,760.75
- VAR Total Profit: \$132,060.97 (27.47%)
- VAR Discount: 32,110.25 (27.47%)
- Total Profit + VIP: 134,006.97 (27.87%)

Below the summary bar, there is a table of items. The 'VAR Dsc (%)' column shows values for selected items. A blue arrow points to the 'Update Selected Items' button at the bottom right of the table.

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	Cust Dsc (%)	Cust Unit Price	Cust Ext Price	Item Type	Unit	Vendor
1 - CAB-AC-C6K-TWLKc - Qty: 11	QTTIM-00 CAB-AC-C6K	Power Cord, 250Vac 16A	45.00		11	495.00	39.00	301.95				143.55	10.00		445.50	Hardware		Cisco
2 - GLC-SX-MMDs - Qty: 50	QTTIM-00 GLC-SX-MMDs	1000BASE-SX SFP trans	500.00		50	25,000.00	39.00	15,250.00	39.00	63.93	195.00	9,750.00	0.00		25,000.00	Hardware		Cisco
3 - SFP-10G-LRM - Qty: 44	QTTIM-00 SFP-10G-LRM	100BASE-LRM SFP MLC	1,100.00		44	48,400.00	39.00	29,524.00	39.00	63.93	429.00	18,876.00	0.00		48,400.00	Hardware		Cisco
5 - WS-C4506E-S7L-96W+ - Qty: 8	QTTIM-00 WS-C4506E-S7L-96W+	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		144,000.00	Hardware		Cisco
C4K-SLOT-4 Catalyst 4500 E-Series f	QTTIM-00 C4K-SLOT-4	Catalyst 4500 E-Series f	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 StrataVAR interface after the pricing operation. The top summary bar displays the following 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%)
- Total Profit + VIP: 212,693.72 (44.24%)

Below the summary bar, the 'VAR Dsc (%)' column for all selected items is now 44. A blue arrow points to the 'Update Selected Items' button at the bottom right of the table.

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	Cust Dsc (%)	Cust Unit Price	Cust Ext Price	Item Type	Unit	Vendor
1 - CAB-AC-C6K-TWLKc - Qty: 11	QTTIM-00 CAB-AC-C6K	Power Cord, 250Vac 16A	45.00		11	495.00	44.00	277.20				168.30	10.00		445.50	Hardware		Cisco
2 - GLC-SX-MMDs - Qty: 50	QTTIM-00 GLC-SX-MMDs	1000BASE-SX SFP trans	500.00		50	25,000.00	44.00	14,700.00				11,000.00	0.00		25,000.00	Hardware		Cisco
3 - SFP-10G-LRM - Qty: 44	QTTIM-00 SFP-10G-LRM	100BASE-LRM SFP MLC	1,100.00		44	48,400.00	44.00	27,104.00				21,296.00	0.00		48,400.00	Hardware		Cisco
5 - WS-C4506E-S7L-96W+ - Qty: 8	QTTIM-00 WS-C4506E-S7L-96W+	4506-E Chassis, two WS	18,000.00		8	144,000.00	44.00	80,840.00	44.00	78.57	7,920.00	63,960.00	0.00		144,000.00	Hardware		Cisco
C4K-SLOT-4 Catalyst 4500 E-Series f	QTTIM-00 C4K-SLOT-4	Catalyst 4500 E-Series f	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 web application 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 is a summary section showing various price and profit metrics. The main area features a table titled 'Quote: QT-000002127 - STD\_USR LongBom - STD\_USR LongBom (Account: idan\_test)'. The table has 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 'VAR Unit Margin' cell for the first item, which is currently '0.655', indicating it is double-clicked for editing.

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	Vendor
...1 - CAB-AC-C8K-TWLK=	Qty: 11					495.00	39.00	301.95				193.05	0.00		495.00			
QTITM-00 CAB-AC-C8K-TWLK=	Qty: 11	Power Cord, 250Vac 16	45.00		11	495.00	39.00	301.95	39.00	63.93	0.655	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			
QTITM-00 GLC-SX-MN	Qty: 50	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	39.00	29,524.00				18,876.00	0.00		48,400.00			
QTITM-00 SFP-10G-LF	Qty: 44	10GBASE-LRM SFP M	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-S7L+96V+	Qty: 8					406,976.00	25.38	303,684.80				103,291.20	0.00		406,976.00			
QTITM-00 WS-C4506E	Qty: 8	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
QTITM-00 CON-SNT-C	Qty: 8	SNTC-8XSXBD 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
QTITM-00 C4K-SLOT-C	Qty: 16	Catalyst 4500 E-Series f	0.00		16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Hardware		Cisco
QTITM-00 C4500E-LB	Qty: 8	Lan Base to IP Base lic	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
QTITM-00 C4500E-S6	Qty: 8	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

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

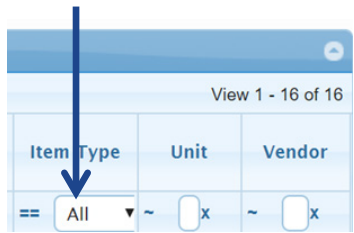
To edit the field of another item, simply click it in the same way as above.

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**.



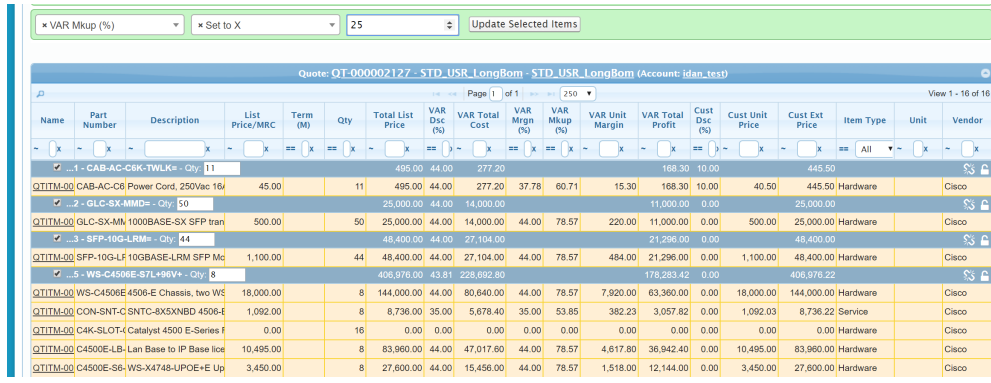
2 Click the **Select All**  button.

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 –



- 6 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 open. The top green area contains summary information: Total List Price: \$480,871.00, Customer Total Price: \$337,592.50, 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%), Total Profit + VIP: 69,464.50 (20.58%). Below this is a table with columns: Name, Part Number, Description, List Price/MRC, Term (M), Qty, Total List Price, VAR Dsc (%), VAR Total Cost, VAR Mrgn (%), VAR Unit Price, VAR Total Profit, Cust Dsc (%), Cust Unit Price, Cust Ext Price, Item Type, Unit, Vendor. A blue arrow points to the 'Update Selected Items' button in the top green area. Another blue arrow points to the 'Cust Unit Prices' column in the table.

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 open. The top green area contains summary information: Total List Price: \$1,515,892.00, Customer Total Price: \$1,214,902.60, Customer Discount: 300,989.40 (19.86%), VAR Total Cost: \$966,669.40, VAR Total Profit: \$248,233.20 (%20.43%), VAR Discount: 549,222.60 (36.23%), Total Profit + VIP: 248,233.20 (20.43%). Below this is a table with columns: Name, Part Number, Description, List Price/MRC, Term (M), Qty, Total List Price, VAR Dsc (%), VAR Total Cost, VAR Mrgn (%), VAR Unit Price, VAR Total Profit, Cust Dsc (%), Cust Unit Price, Cust Ext Price, Item Type, Unit, Vendor. A blue arrow points to the 'Update Selected Items' button in the top green area. A tooltip is displayed over the 'Customer Total Price' field, showing a breakdown: 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), 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.

Total List Price: \$132,434.00Customer Total Price: \$107,572.14Customer Discount: 24,861.86 (18.77%)VAR Total Cost: \$41,096.40VAR Total Profit: \$65,675.74 (76.10%)VAR Discount: 90,537.60 (68.36%)Total Profit + VIP: 65,675.74 (81.05%)

Selected Quote Items: 2Quote Start Date: Click to setQuote End Date: Click to set

QtySet to XUpdate Selected Items

Quote: QT-000002927 - InetJun18 (Account: idan_1es9)														
Name	Part Number	Description	Qty	Unit Price/Misc	Term	Unit	Qty	Total List Price	VAR Disc (%)	VAR Total Cost	VAR Margin (%)	VAR Mktg (%)	VAR Unit Margin	VAR Total Profit
1 - WS-C3850-48P-BL - Qty: 6								18,434.00	00.00	18,434.00				0.00
Q11TM-0001175 CON-SNT-W8504-SNTC-8X3XNBD Cisco Catalyst 3850			6	3,074.00	30.00			2,011.80	27.00	36.99	124.02	744.12	4.11	459.32
2 - C3850-48P-E - Qty: 2								30,134.00	00.00	11,150.40				19,000.00
Q11TM-0001175 C3850-DNA-E-48 C3850 DNA Essentials, 48-port - 2			3	3,360.00	30.00			2,352.00	30.00	42.86	336.00	1,008.00	0.00	1,120.00
Q11TM-0001175 CON-SNT-C3850-SNTC-8X3XNBD Catalyst 3850 48-			3	1,794.00	30.00			1,255.80	30.00	42.86	179.40	538.20	0.00	598.00
3 - C3850-48P-E - Qty: 2								27,600.00	00.00	9,256.00				18,344.00
Q11TM-0001175 C3850-DNA-E-48 C3850 DNA Essentials, 48-port - 3			2	2,240.00	30.00			1,568.00	30.00	42.86	336.00	872.00	0.00	1,120.00
Q11TM-0001175 CON-SNT-C3850-SNTC-8X3XNBD Catalyst 3850 48-			2	1,196.00	30.00			837.20	30.00	42.86	179.40	358.80	0.00	598.00



**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).

Copy Selected BoM Items to Quote

All items

Box headers only

Priced items only

BoMs



**Save** – Saves the Quote.



**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**

Customer Unit Price  
Customer Discount

**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 –

BoM Grouping							
Create   Rename   Delete   Search   <input type="checkbox"/> Unlock Boxes   Clear							
Name	Quantity	VAR Cost	Line Number	Description	Item Type	Vendor	
Group A							
FP-AMC-LIC-	80	\$4,473.60	-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 Stick Cld-Mngd 48x GigE 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-CR-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	
MS-C3560CX-8PC-S	1	\$809.10	-9	Cisco Catalyst 3560-CX 8 Port PoE IP Base	Hardware	Cisco	
MS225-48FP-HW	2	\$375.00	-10	19in RackMount for Catalyst 3560,2960,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	\$1,885.00	-13	Meraki MS225-48FP L2 Stick Cld-Mngd 48x GigE 740W PoE Switch	Hardware	Cisco	
LIC-MS225-48FP-1YR	1	\$232.50	-14	Meraki MS225-48FP Enterprise License 1YR	Software	Cisco	
MS220-8P-HW	1	\$627.50	-15	Meraki MS220-8P L2 Cloud Managed 8 Port GigE 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	
							<div>Save   Cancel</div>

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.



**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.

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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.

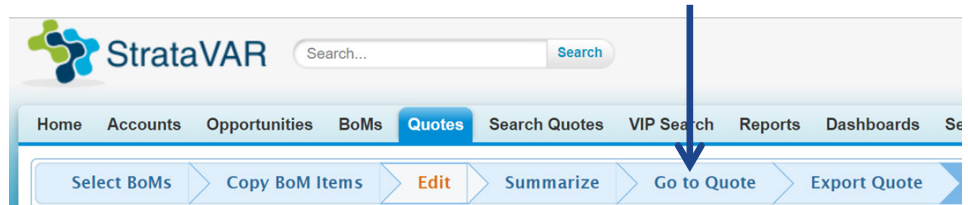
**Note –** People with expertise in Force.com programming and who have some StrataVAR PQW training can create additional quote templates, in addition to those provided by StrataVAR PQW.

## 6.2 Generating a Quote – How To

### ► To generate a customer-facing Quote –

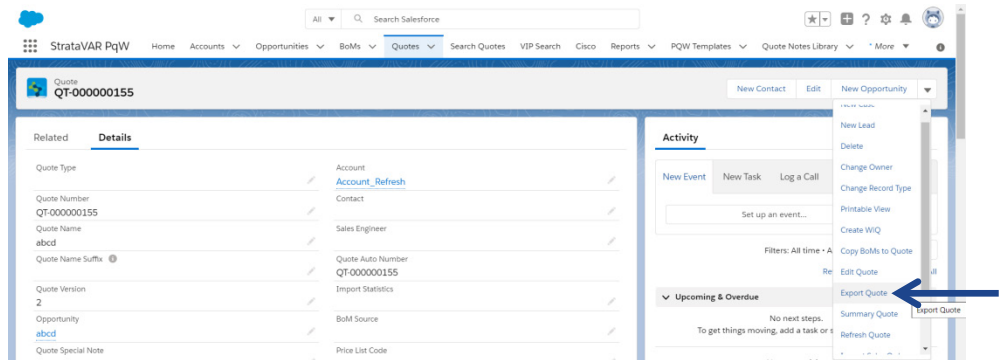
1 Start generating a customer-facing Quote using one of the following options –

- Select the **Quotes** tab and then click the **Go to Quote** tab, shown below –

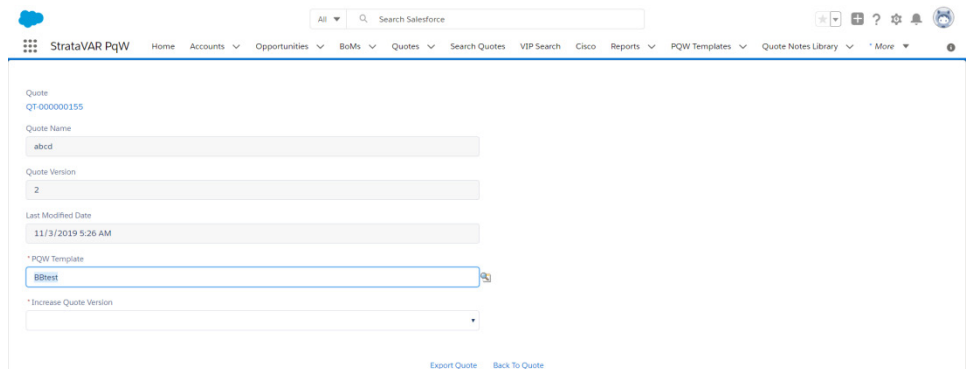


– OR –

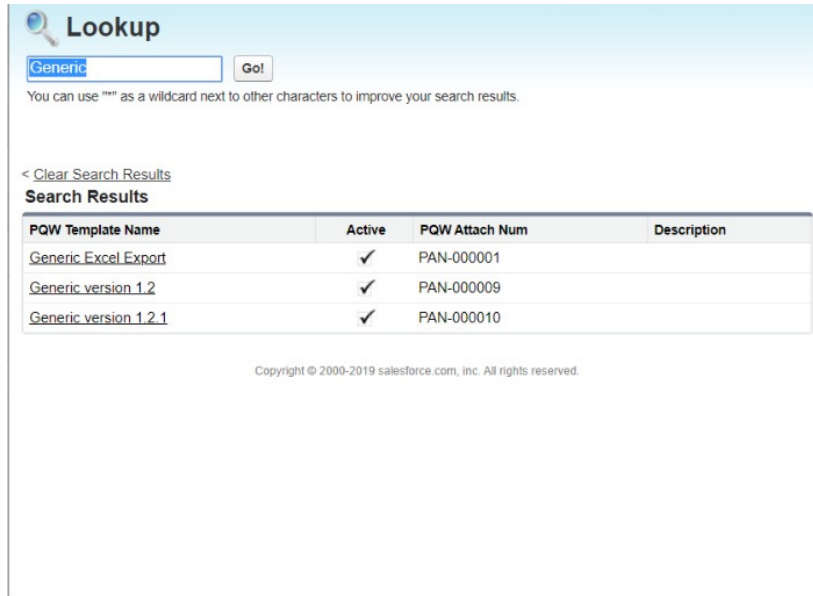
- Select the **Quotes** tab and then click the **Export Quote** button, shown below –



In both cases, the following displays –

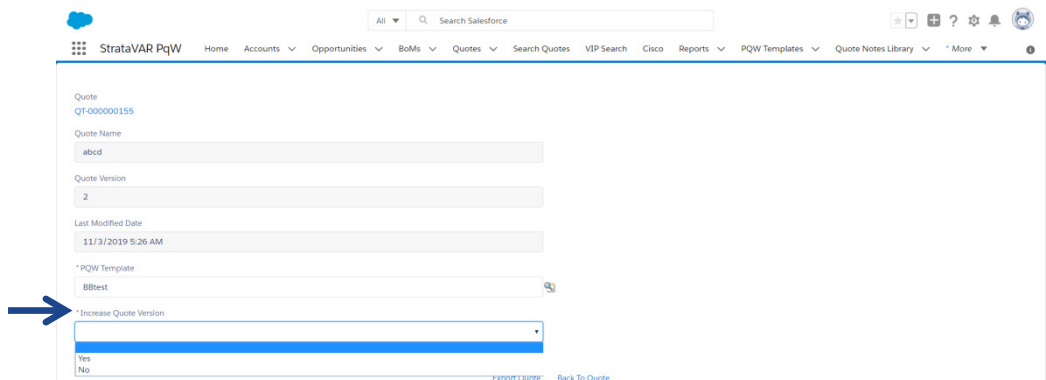


- 2 In the **PQW Template** field, leave the currently selected Quote's PQW template or click in the field to select a different template in the dropdown menu. The template is empty the first time that the Quote is exported, and remembers the last selection.



PQW Template Name	Active	PQW Attach Num	Description
<a href="#">Generic Excel Export</a>	✓	PAN-000001	
<a href="#">Generic version 1.2</a>	✓	PAN-000009	
<a href="#">Generic version 1.2.1</a>	✓	PAN-000010	

- 3 In the **Increase 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.



Quote: QT-000000155

Quote Name: abcd

Quote Version: 2

Last Modified Date: 11/3/2019 9:26 AM

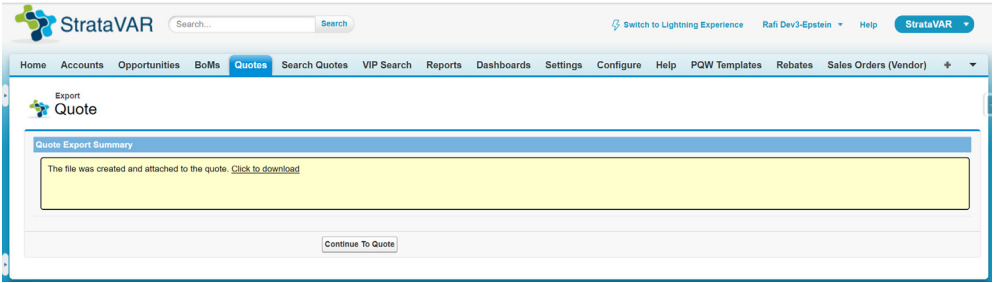
\* PQW Template: BBtest

\* Increase Quote Version: Yes

export quote Back To Quote

**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 125.

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



- 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
<b>CAB-AC-C6K-TWLK=</b>				
CAB-AC-C6K-TWLK=	Power Cord, 250Vac 16A, twist lock NEMA L6-20 plug, US	11	\$31.50	\$346.50
	<b>Subtotal</b>			<b>\$346.50</b>
<b>GLC-SX-MMD=</b>				
GLC-SX-MMD=	1000BASE-SX SFP transceiver module, MMF, R50nm, DOM	50	\$350.00	\$17,500.00
<b>Software</b>				

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

StrataVAR PqW

HomeAccountsOpportunitiesBoMsQuotesSearch QuotesVIP SearchCiscoReportsPQW TemplatesQuote Notes LibraryMore

QuoteQT-000000155

New ContactEditNew Opportunity

RelatedDetails

Quote Items (6+)

QUOTE ITEM NAME	PART NUMBER	QUANTITY	TOTAL LIST PRICE
<a href="#">QTTTM-000028664</a>	CAB-AC-C6K-TWLK+	10	\$450.00
<a href="#">QTTTM-000028665</a>	GLC-SX-MMD+	5	\$2,500.00
<a href="#">QTTTM-000028666</a>	SFP-10G-LRM+	44	\$48,400.00
<a href="#">QTTTM-000028667</a>	SFP-GE-S-RF	1	\$332.00
<a href="#">QTTTM-000028668</a>	WS-C4506E-S7L-96V+	10	\$180,000.00
<a href="#">QTTTM-000028669</a>	CON-SNT-C450657L	10	\$10,920.00

View All

Quote Attachments (2)

QUOTE ATTACHMENT NAME	LAST STATUS	ACTIVE	RECORD TYPE
<a href="#">QT-000000155-3 (abcd 2019-...)</a>	Export	<input checked="" type="checkbox"/>	Excel Quote
<a href="#">QT-000000155-2 (abcd 2019-...)</a>	Export	<input type="checkbox"/>	Excel Quote

View All

Activity

New EventNew TaskLog a CallEmail

Set up an event...Add

Filters: All timeAll activitiesAll types

RefreshExpand AllView All

Upcoming & Overdue

No next steps.  
To get things moving, add a task or set up a meeting.

No past activity.  
Past meetings and tasks marked as done show up here.

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# Refresh Options

This chapter describes the various refresh options available in StrataVAR.

## 7.1 Overview

The refresh options available in StrataVAR vary, depending on whether they apply to a BoM or a Quote, as well as under what conditions they are made in the application. Refresh options may be used in the following scenarios –

- **When Changes are Made in the CCW**, page 132
- **When Changes are Made in the BoM**, page 133
- **When Changes are Made in the Quote**, page 134
- **When Importing the CCW into Another Quote**, page 135

# 7.2 Refresh Option When There are Changes in the CCW

The following refresh options are available when there are changes in the CCW, when **refreshing a BoM**.

Scenario	Change In BoM After Refresh	Change in Quote After Refresh
Add and Item in CCW	The new added item appears in the refreshed BoM.	The new added item appears in the refreshed Quote.
Delete an Item from CCW	The deleted item is removed from refreshed BoM.	The deleted item is removed from the refreshed Quote.
Modify an Item in CCW	Items are modified in the refreshed BoM too. You should test by changing the Start and End period, Quantity, VAR cost and discount in CCW.	Items are modified in the refreshed Quote too. You should test by changing the Start and End period, Quantity, VAR cost and discount in CCW.



The following refresh options are available when there are changes in the CCW, when **refreshing a Quote**.

Scenario	Change in BoM After Refresh	Change in Quote After Refresh
Add and Item in CCW	There is no change in the BoM. Only the Quote is refreshed.	There is no change in the Quote. The BoM remains unchanged.
Delete an Item from CCW	There is no change in the BoM. Only the Quote is refreshed.	There is no change in the Quote. The BoM remains unchanged.
Modify an Item in CCW	There is no change in the BoM. Only the Quote is refreshed.	There is no change in the Quote. The BoM remains unchanged.

## 7.3 Refresh Options When There are Changes in the BoM

The following refresh options are available when there are changes in the BoM, when refreshing a BoM.

Scenario	Change In BoM After Refresh	Change in Quote After Refresh
Add and Item in BoM	Clicking <b>Refresh BoM</b> does not remove the manually added item after the refresh.	The manually added item is reflected in the Quote after the <b>BoM Refresh</b> action.
Delete an Item from BoM	After the BoM refreshes, the deleted item returns, as if it was not removed.	There is no change in the Quote.
Modify an Item in BoM	All the modified changes are overwritten. You should check by changing several fields.	There is no change in the Quote.

The following refresh options are available when there are changes in the BoM, when refreshing a Quote.

Scenario	Change In BoM After Refresh	Change in Quote After Refresh
Add and Item in BoM	There is no change in the BoM.	The manually added item in the BoM is reflected in the Quote.
Delete an Item from BoM	There is no change in the BoM.	The deleted item in the BoM is deleted in the Quote.
Modify an Item in BoM	There is no change in the BoM.	The modified changes are reflected in the Quote.

## 7.4 Refresh Options When There are Changes in the Quote

The following refresh options are available when there are changes in the Quote, when refreshing a BoM.

Scenario	Change In BoM After Refresh	Change in Quote After Refresh
Add an Item in Quote	There is no change in the BoM.	The manually added item is there, as is.
Delete an Item from Quote	There is no change in the BoM.	After the BoM refreshes, the deleted item returns, as if it was not removed.
Modify an Item in Quote	There is no change in the BoM.	All the changes are overwritten in the Quote.

The following refresh options are available when there are changes in the Quote, when refreshing a Quote.

Scenario	Change In BoM After Refresh	Change in Quote After Refresh
Add an Item in Quote	There is no change in the BoM.	There is no change in the Quote. Manually added items are not removed from the Quote or BoM.
Delete an Item from Quote	There is no change in the BoM.	The item returns as if it was not deleted.
Modify an Item in Quote	There is no change in the BoM.	The modified changes in the Quote are overwritten from the BoM.

# **7.5 Refresh Options When Importing the CCW-R into Another Quote**

The following refresh options are available when importing the CCW-R into another Quote, when refreshing a BoM.

Scenario	Change In BoM After Refresh	Change in Quote After Refresh
Add an Item in CCW for First CCW Quote	The new added item appears in the refreshed BoM.	The new added item appears in the refreshed Quote and the item from another Quote is also there.
Delete an Item from CCW for First Quote	The deleted item is removed from the refreshed BoM.	The deleted item is removed from the refreshed Quote and the item from another Quote is also there.

Scenario	Change In BoM After Refresh	Change in Quote After Refresh
Modify an Item from CCW for First CCW Quote	The items are modified in the refreshed BoM. You should check by changing the Start and End period, Quantity, VAR cost and discount in CCW.	The items are modified in the refreshed Quote and the item from another Quote is also there. You should check by changing the Start and End period, Quantity, VAR cost and discount in CCW.

The following refresh options are available when importing the CCW into another Quote, when refreshing a Quote.

Scenario	Change In BoM After Refresh	Change in Quote After Refresh
Add an Item in CCW for First CCW Quote	There is no change in the BoM.	There is no change in the Quote.
Delete an Item from CCW for First Quote	There is no change in the BoM.	There is no change in the Quote.
Modify an Item from CCW for First CCW Quote	There is no change in the BoM.	There is no change in the Quote.



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# StrataVAR

Email – [help@StrataVAR.com](mailto:help@StrataVAR.com)  
Phone – Call toll free from our website.  
**[www.StrataVAR.com](http://www.StrataVAR.com)**

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