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.

Table of Contents

Chapter 1 – Introducing StrataVAR PQW 7

1.1 Introduction 7

1.2 Basic Concepts and Terms 8

1.2.1 The Source (Suppliers) 8
1.2.2 VAR 8
1.2.3 Quotes 8
1.2.4 Cost 9
1.2.5 BoM 9
1.2.6 Assembly 10
1.2.7 Price (End-customer) 10
1.2.8 Salesforce Concepts and Terms 10

1.3 Workflow – Using StrataVAR PQW 14

1.3.1 Workflow Flexibility 15

1.4 How To – Quick Reference 16

1.4.1 How Do I? 16
1.4.2 What Does This Do? 17

Chapter 2 – Quick Tour of the Interface 19

2.1 Getting Started 19

2.1.1 Launching StrataVAR PQW 19
2.1.2 Creating or Selecting an Account 23
2.1.3 Creating/Selecting an Opportunity or Project 24

2.2 StrataVAR PQW User Interface 28

2.2.1 StrataVAR PQW Tabs 28
2.2.2 StrataVAR PQW Subtabs 29
2.2.3 Filtering Tables in PQW Grids 30
2.2.4 Object Relationships 31
2.2.5 Viewing Field Values 33
2.2.6 Table (Grid) Row Pagination 34
2.2.7 VIP Search 34

Chapter 3 – Importing Sources – Creating BoMs 39

3.1 Importing – Introduction 39

3.2 Importing – How To 42

3.3 BoM Details Tab 50

3.3.1 BoM Detail Buttons 52
3.3.2 Disti Quote Merge 54
3.3.3 Defining a BoM as Reusable 59

3.4 Handling a Maintenance BoM 59

3.4.1 Overview 59
3.4.2 Defining a Maintenance BoM 60
3.4.3 CCW-R Invoice 66

Chapter 4 – Assembling a Quote 69

4.1 Assembling – Introduction 69

4.2 Assembling – Workflow 70

4.3 Creating a Quote Container 70

4.4 Defining a Quote 72

4.4.1 Quote Notes Library 78
4.4.2 Quote Details Buttons 80

4.5 Selecting the BoMs to Be Included in the Quote 88

4.5.1 Options for Selecting BoMs 89
4.5.2 Listing the BoMs for Selection 90
4.5.3 Selecting the BoMs to Be Included in the Quote 92

4.6 Selecting and Copying BoM Items into the Quote 93

4.6.1 Selecting the BoM Items to Be Copied into the Quote 93
4.6.2 Specifying the Quantity of the BoM Boxes/Items 96
4.6.3 Copying Items into the Quote 97

4.7 Editing a Quote – Costing and Pricing Items 98

4.10 Summary Quotes **100**

4.10.1 Automatic Summary Quotes 103
4.10.2 Manual Summary Quote 105
4.10.3 Refreshing a Summary Quote 109

Chapter 5 – Pricing a Quote 111

5.1 Pricing – Introduction **111**

5.2 Pricing – Workflow **111**

5.3 Filtering the Quote Items That Are Displayed **112**

5.4 Defining the Pricing Operation and Value **114**

5.5 Adjusting the Pricing of Specific Items **117**

5.6 Example – Applying a 10% Markup to the Entire Quote **118**

5.6.1 Aggregation and Summary Area 119

Chapter 6 – Exporting a Quote 125

6.1 Generating a Quote – Introduction **125**

6.2 Generating a Quote – How To **126**

Chapter 7 – Refresh Options 131

7.1 Overview **131**

7.2 Refresh Option When There are Changes in the CCW **132**

7.3 Refresh Options When There are Changes in the BoM **133**

7.4 Refresh Options When There are Changes in the Quote **134**

7.5 Refresh Options When Importing the CCW-R into Another Quote **135**

Index 137

Important Notice

Copyright © 2020 StrataVAR Ltd. All Rights Reserved.

This documentation is the property of StrataVAR Ltd. and/or its subsidiaries (collectively "StrataVAR"), and it is strictly confidential. All property rights to this documentation, including the rights of confidentiality and the copyright thereto, are to remain at all times the property of StrataVAR. In no event shall any part of this documentation be reproduced, copied, transmitted, stored in a retrieval system or translated into any language, by any means or media, without the express prior written permission of StrataVAR. This documentation is provided solely on an "as-is" basis. StrataVAR makes no warranty, either express or implied, including but not limited to any implied warranties of merchantability or fitness for a particular purpose, regarding this documentation. In no event shall StrataVAR be liable to anyone for special, collateral, incidental or consequential damages in connection with or arising from the use of this documentation. This documentation is designed to assist in the use of StrataVAR's software (the "Software"), solely with respect to the version specified in this documentation. It may not accurately reflect previous or future versions of the Software. This documentation does not in any way warrant description accuracy or guarantee the use of the Software to which it refers.

All other trademarks are the property of their respective owners. Other company and brand products and service names are trademarks or registered trademarks of their respective holders.

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

1

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.

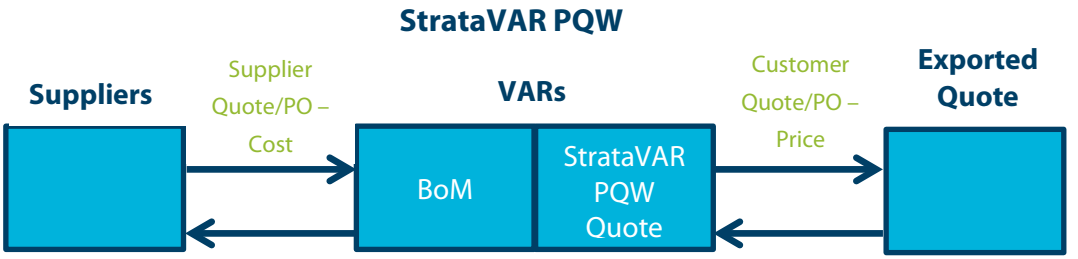


Figure 1 – StrataVAR PQW Quoting Players

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.

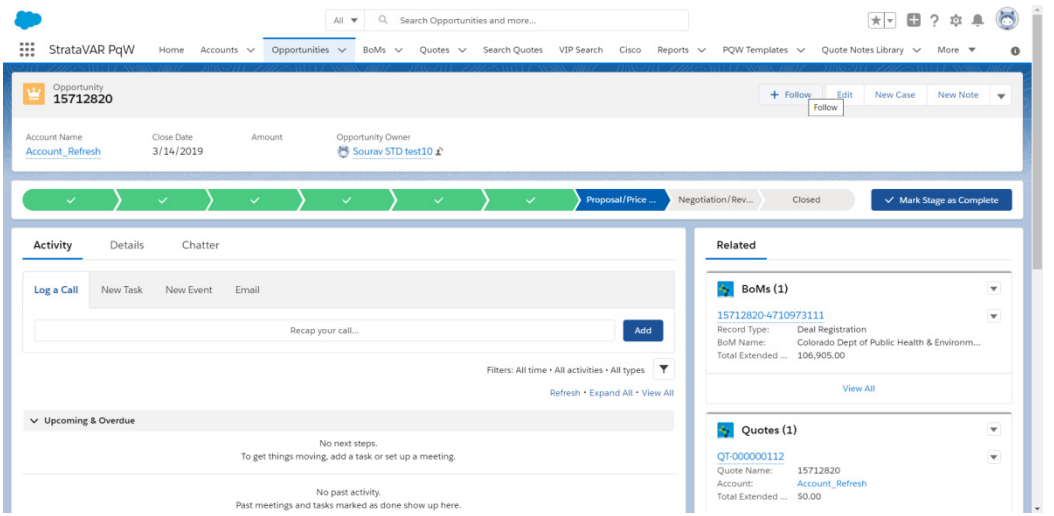
In StrataVAR PQW, almost everything is identical for users of both the **Salesforce Extension** and the **Embedded Salesforce** version, except that StrataVAR PQW operates in the **Opportunities** tab in the Salesforce Extension and in the **Projects** tab in the embedded Salesforce version, as described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

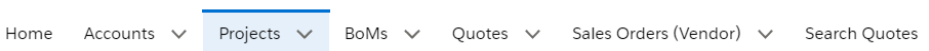
For current Salesforce users, the StrataVAR PQW playing field takes place in the **Opportunities** tab of the Salesforce StrataVAR PQW Extension.

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

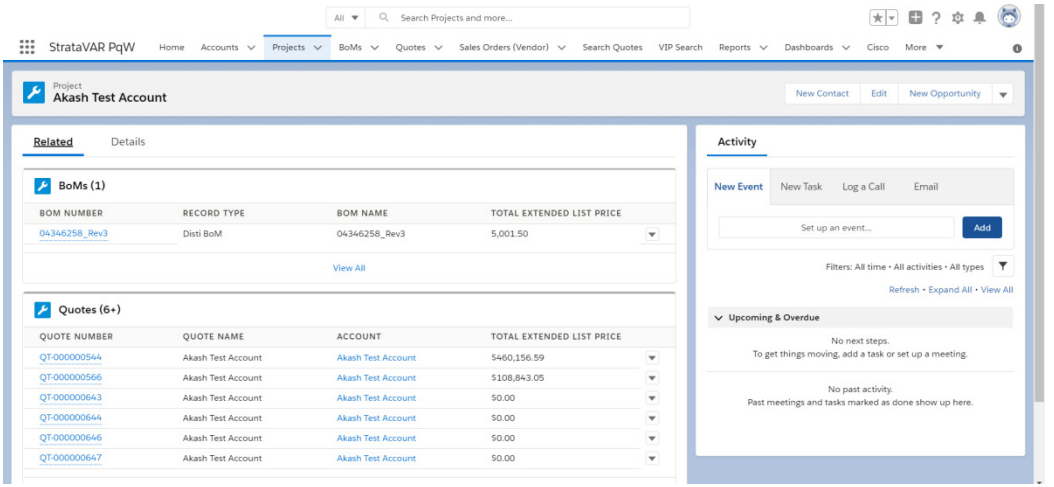


Salesforce Project – Non-Salesforce Users

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 –



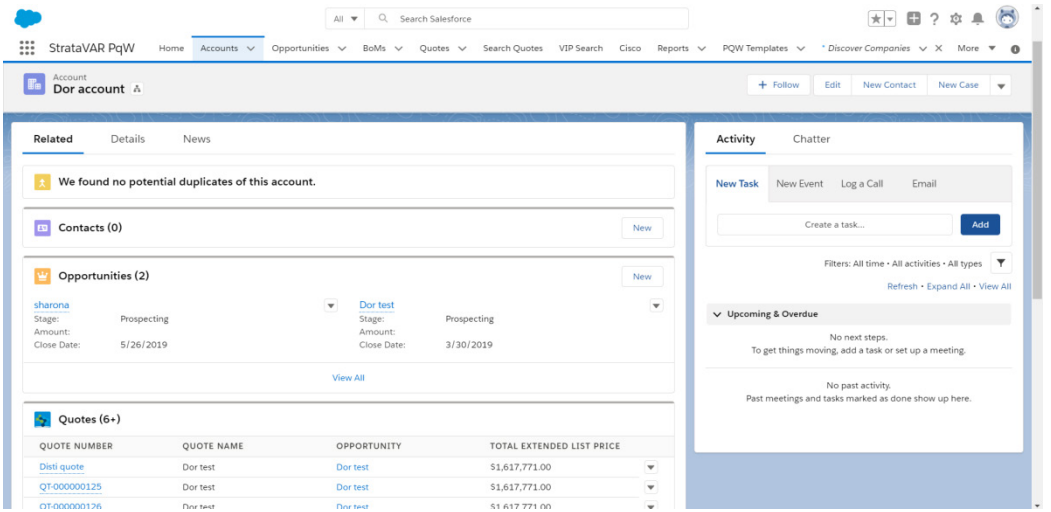
All PQW features of the **Projects** tab work in an identical manner to those described in the **Opportunities** tab throughout this guide. The only difference is whether the features are launched from the **Opportunities** tab in the Salesforce StrataVAR PQW Extension or the **Projects** tab of the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

Account

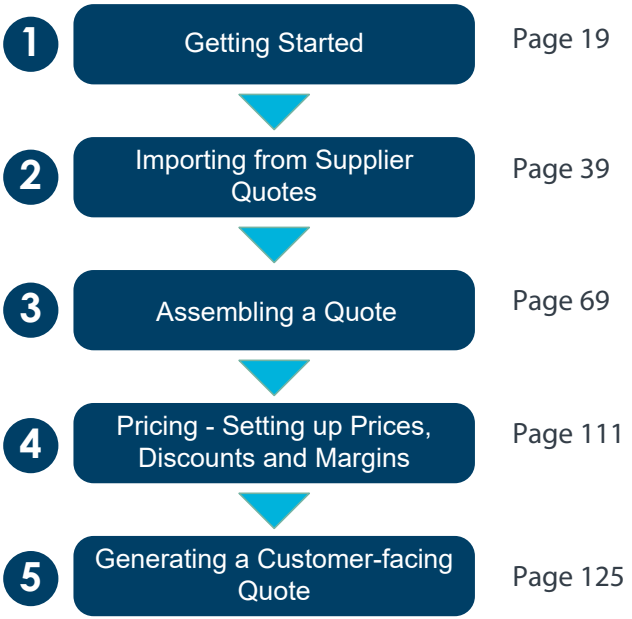
An **Account** usually represents an end-customer company to whom the VAR is selling. Both Salesforce Opportunities and PQW Projects each belong to a specific Account.

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 –



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

2

Quick Tour of the Interface

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

2.1 Getting Started

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

2.1.1 Launching StrataVAR PQW

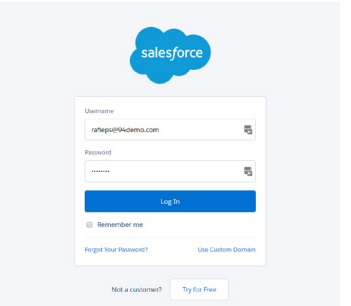
Browser Requirements – The latest version of Firefox, Chrome, Microsoft Edge or Internet Explorer 9 and up.

▶ **To log into StrataVAR PQW –**

1. For current Salesforce users (using the Salesforce StrataVAR PQW Extension), log into Salesforce.com using your usual username and password.

   – OR –

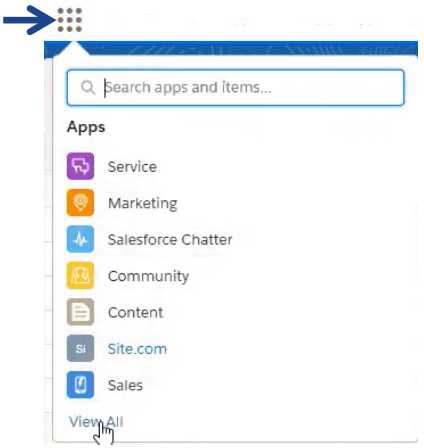
   For non-Salesforce users (using the Embedded Force.com version), log into the following page using the credentials provided to you by StrataVAR –



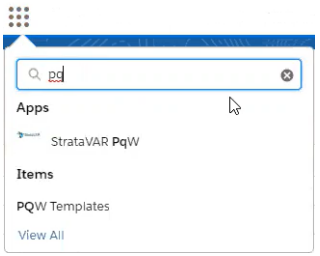
2 Only existing Salesforce users (using this StrataVAR PQW Extension) must perform this step in order to add the strata VAR features to the user interface.

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

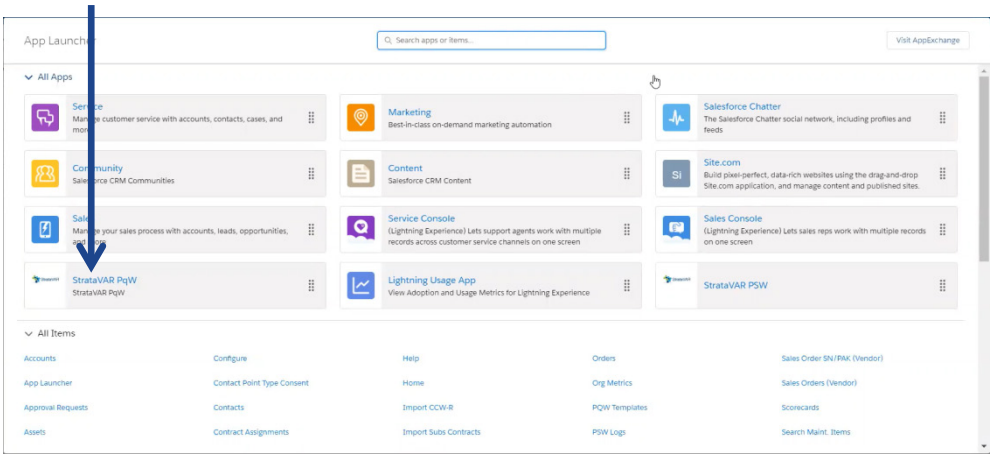
Click the icon at the top left of the window to access the list of applications available in Lightning mode.



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.

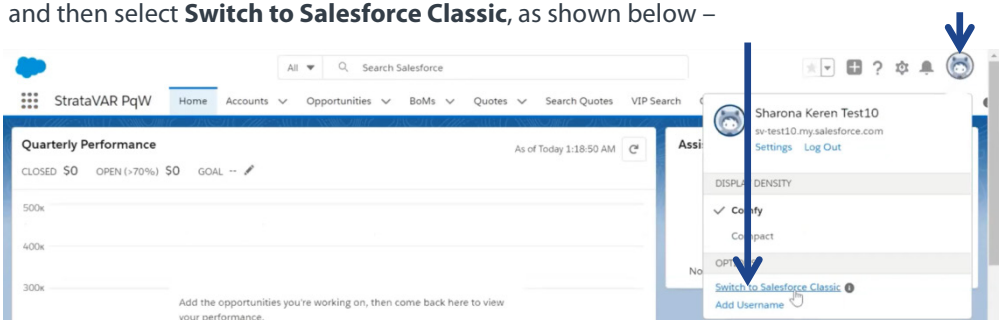


Alternatively, you can click the **View All** link to display the list of all available applications, as shown below. Then, click the **StrataVAR PqW** application to launch the application in Lightning mode.

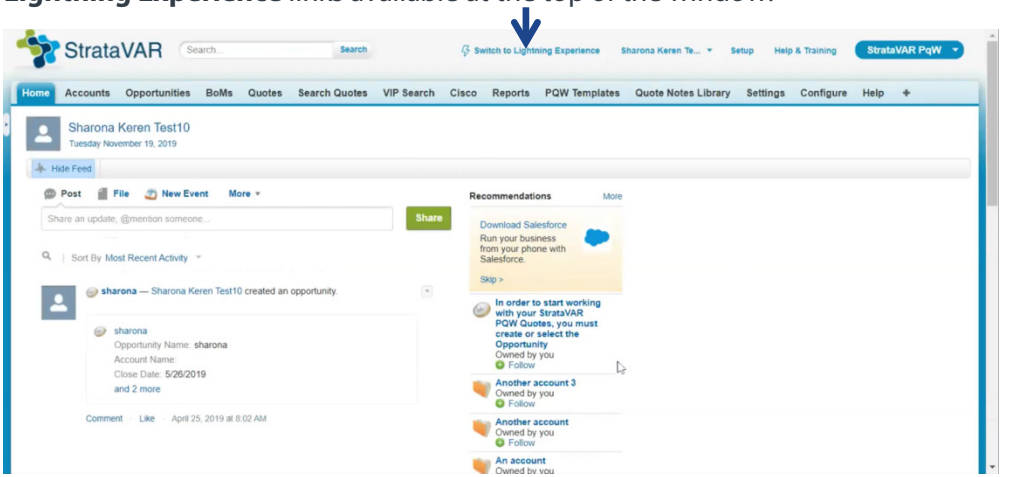


Note – The StrataVAR PQW application is accessible in two modes – Classic mode and Lightning mode (V2 and beyond). The StrataVAR PQW application user interface, features and functionality described in this V2.0 manual relate to Lightning mode. The user interface for Classic mode is described in the *StrataVAR 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 –

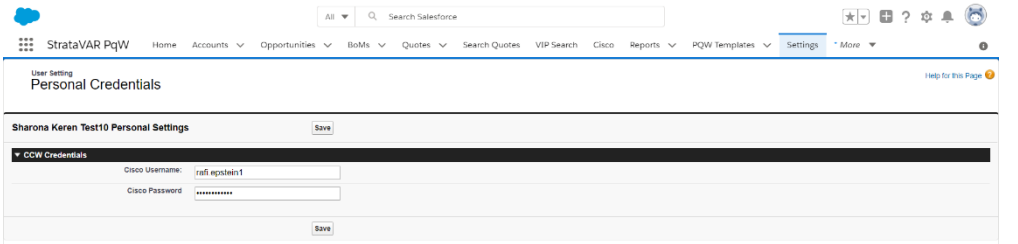


To move from Classic mode to Lightning mode, click the **Switch to Lightning Experience** button at the top of the window below. You can switch between modes at any time by clicking the **Switch to Salesforce Classic** and **Switch to Lightning Experience** links available at the top of the window.



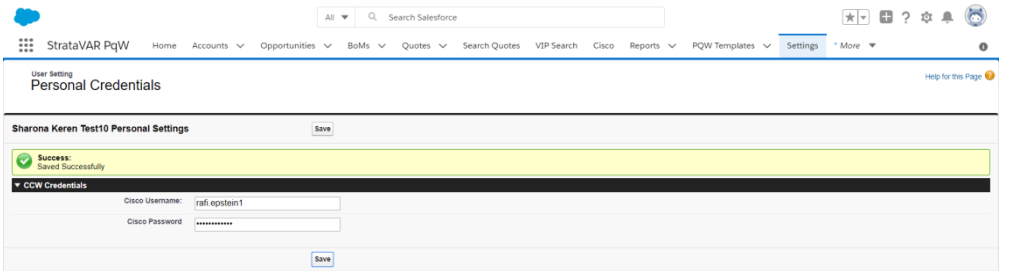
3 From now on all steps are the same for both types of users.

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.



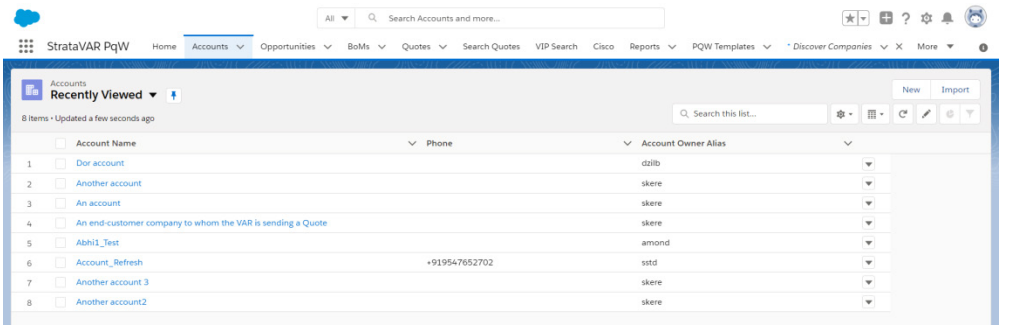
Congratulations. You are up and running!

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.

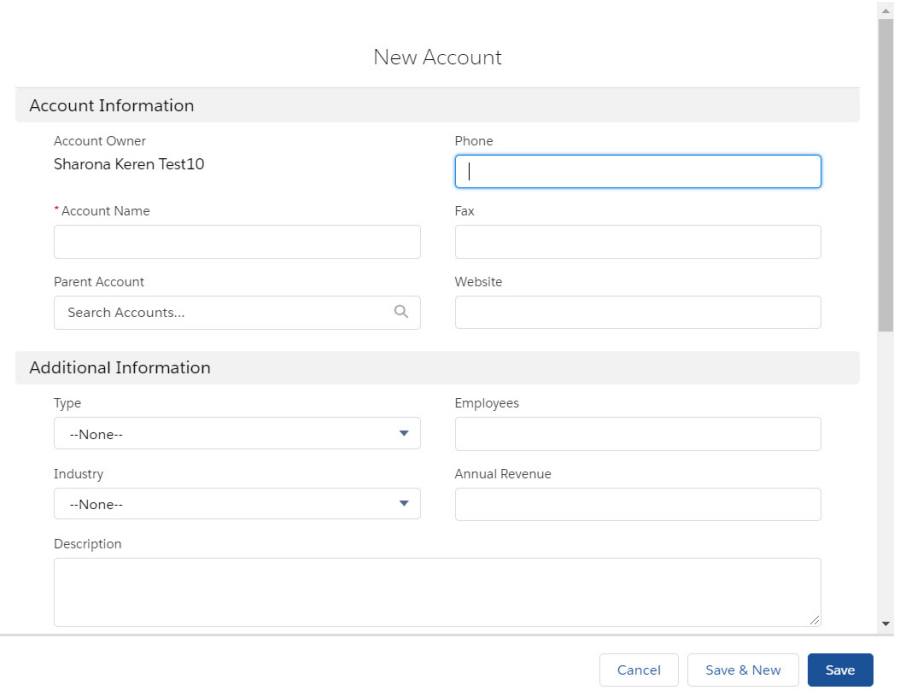
▶ To create or select an Account –

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 –



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

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

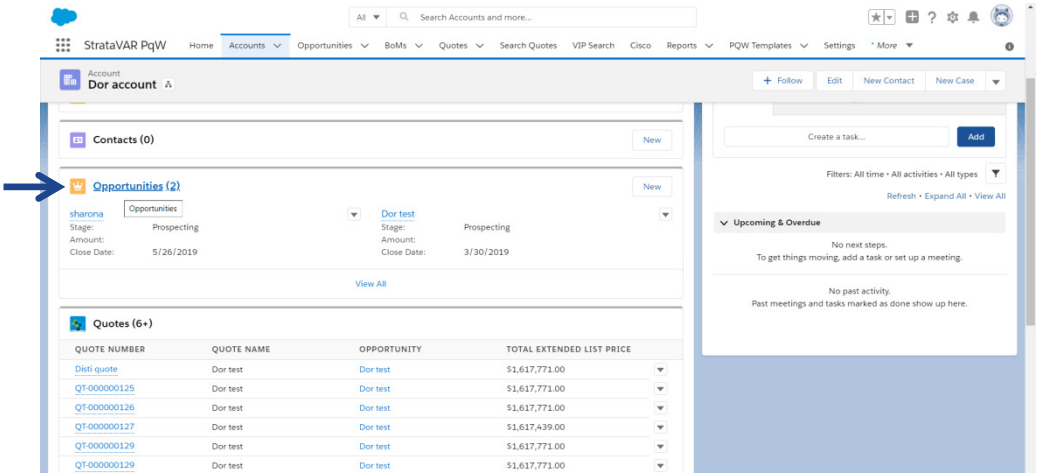
2.1.3 Creating/Selecting an Opportunity or Project

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.

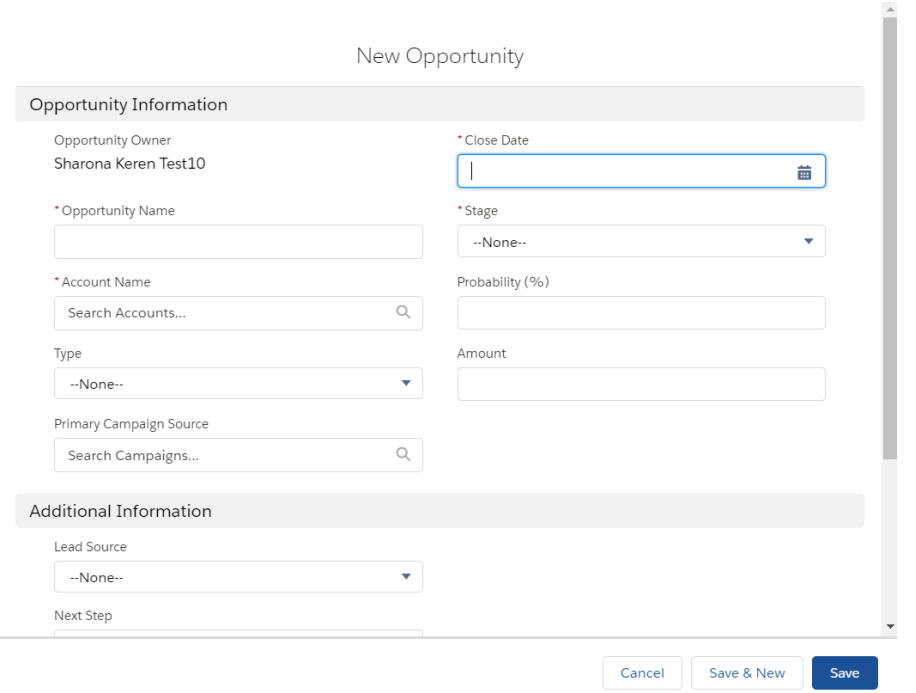
In order to start working with your StrataVAR PQW Quotes, you must create or select the Opportunity or Project (according to the platform on which you are working, as described above) to which the Quote belongs, as described below.

► 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 –



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

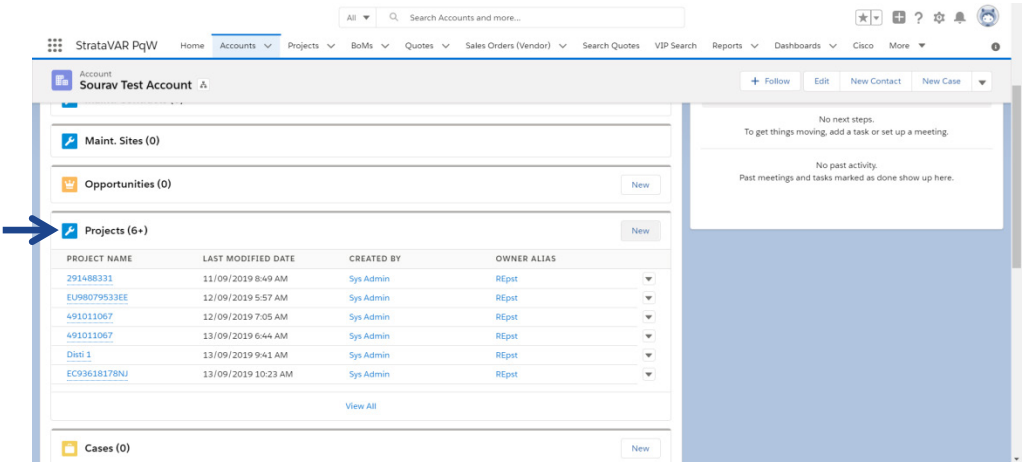


Mandatory fields are indicated by a red asterisk (*).

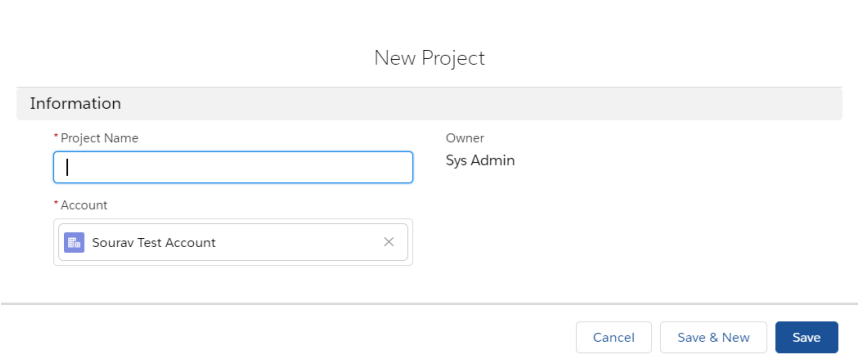
5 Fill out the Account information and click the **Save** button.

▶ 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 –



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.

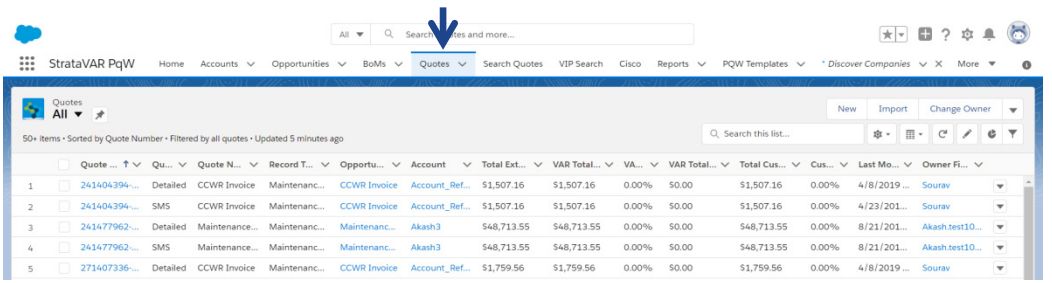
All StrataVAR PQW users have an **Account** and a **Contact** tab, in addition to the **BoMs** and **Quotes** PQW tabs.

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.

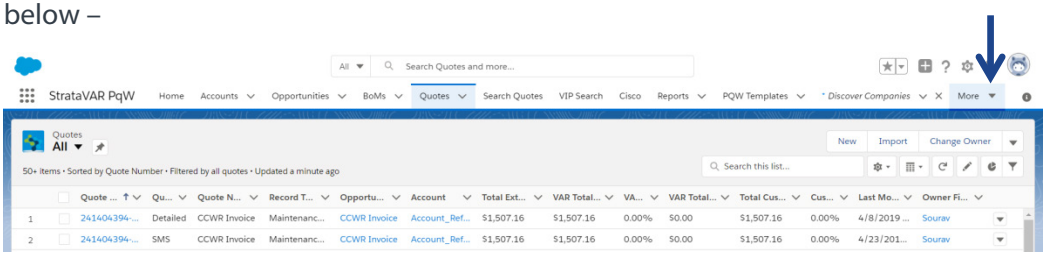
2.2.1 StrataVAR PQW Tabs

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 –

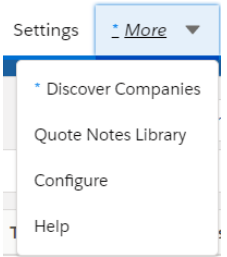


Selecting a tab displays the relevant page underneath and enables access to the functionality associated with it.

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 –

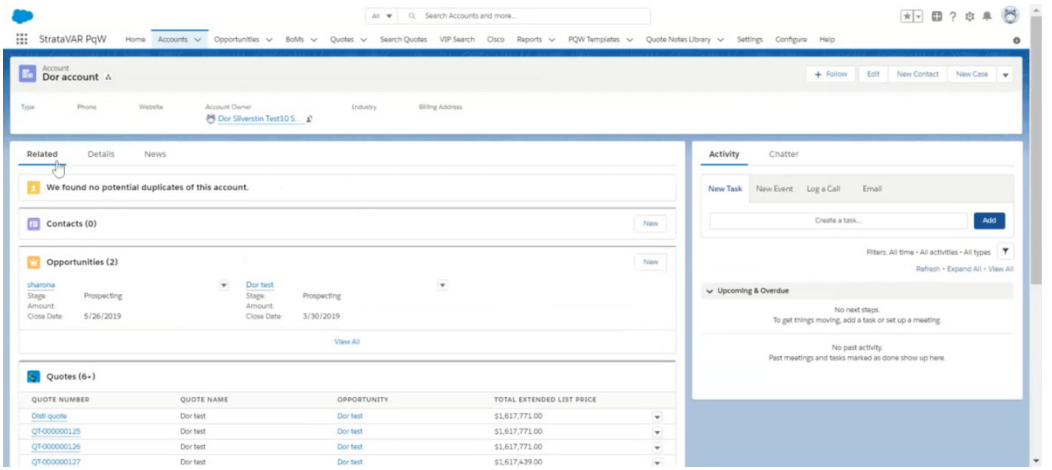


Clicking this down arrow opens a dropdown menu of additional tab options. Simply click an option in the dropdown menu to display its page. For example, as shown below –

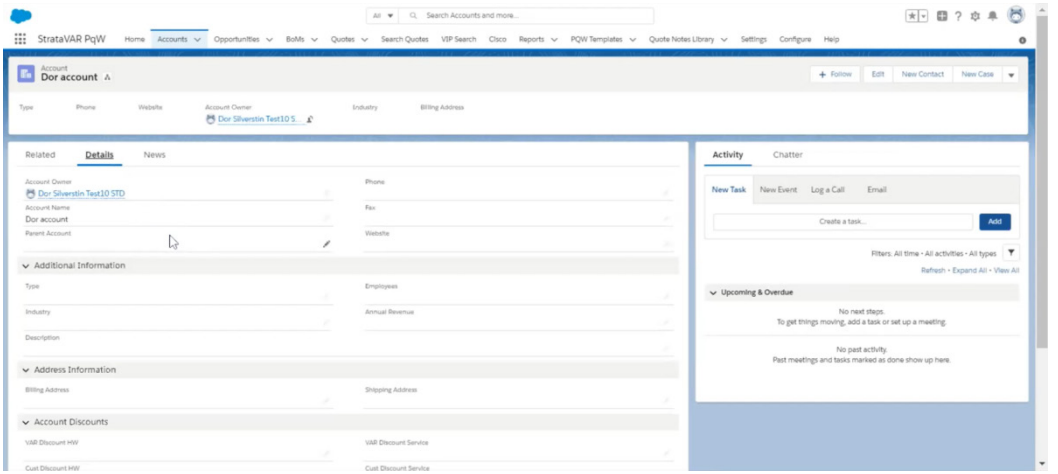


2.2.2 StrataVAR PQW Subtabs

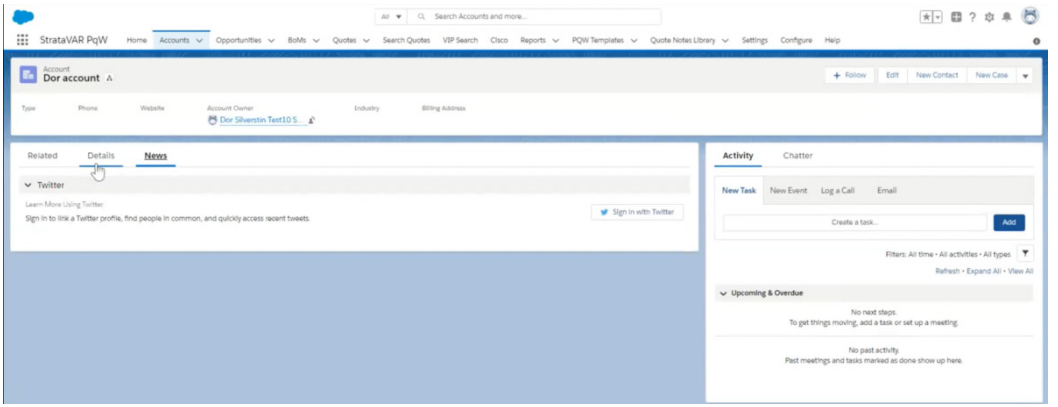
Many windows in StrataVAR PQW display information in multiple subtabs. These subtabs present various types information for the item in a convenient, easy-to-use view. For example, the following shows three subtabs for the DOR account in the Accounts window. These subtabs include the **Related**, **Details**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

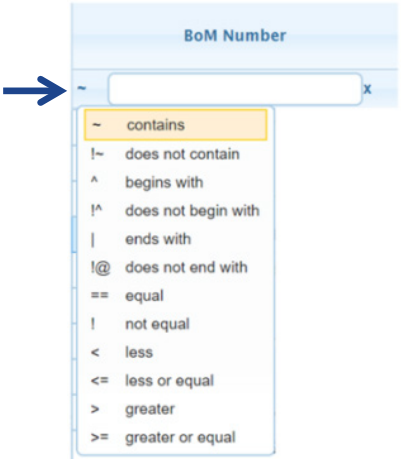
StrataVAR PQW provides a variety of tables that can be filtered. For example, the following shows the filter bar for BoMs.

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 –

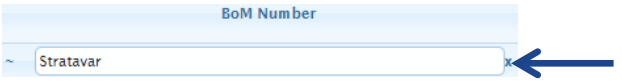


For example, if you select the **contains** operator in the BoM number and enter the value **123**, then only BoMs that have the value **123** in this column are listed.

Clearing a Table's Filter

▶ **To clear a filter in the table –**

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

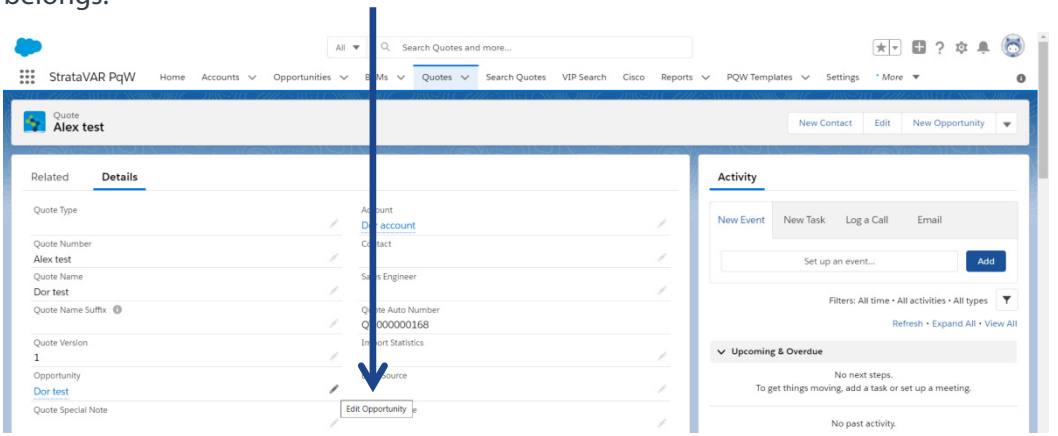


2.2.4 Object Relationships

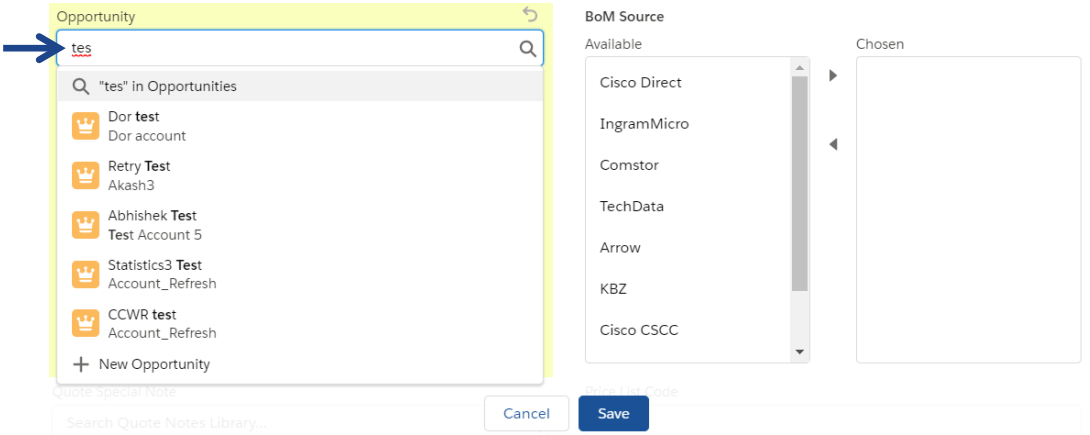
In PQW, relationships are created between objects that link the objects with each other so that when a user views a specific object, they can also see related data.

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.



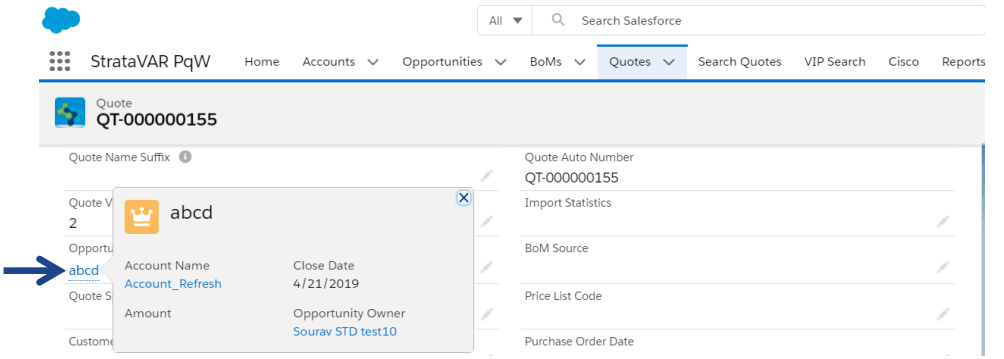
Clicking anywhere in the **Opportunity** field opens an Edit window. This window displays a lookup list for the **Opportunity** field in which you can select one of the existing related objects (such as an **Opportunity**). For example –



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.

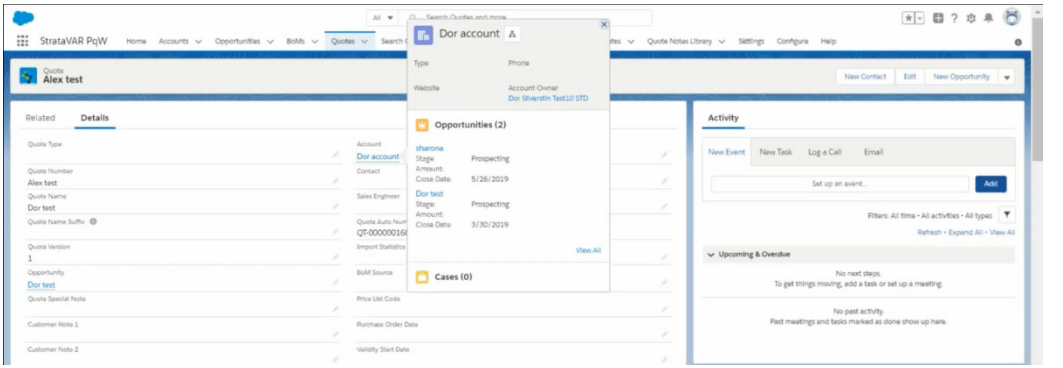
StrataVAR PQW makes sure to only offer a selection of objects that you are allowed to pick.

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.



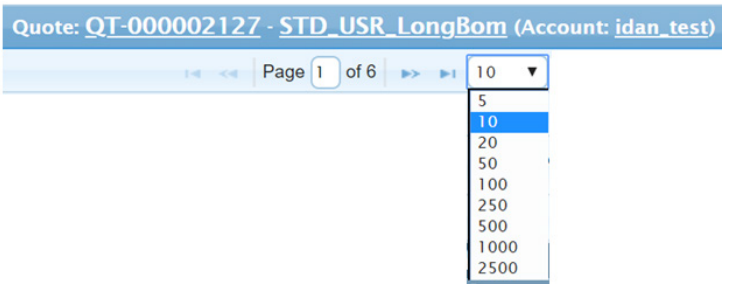
2.2.5 Viewing Field Values

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 –

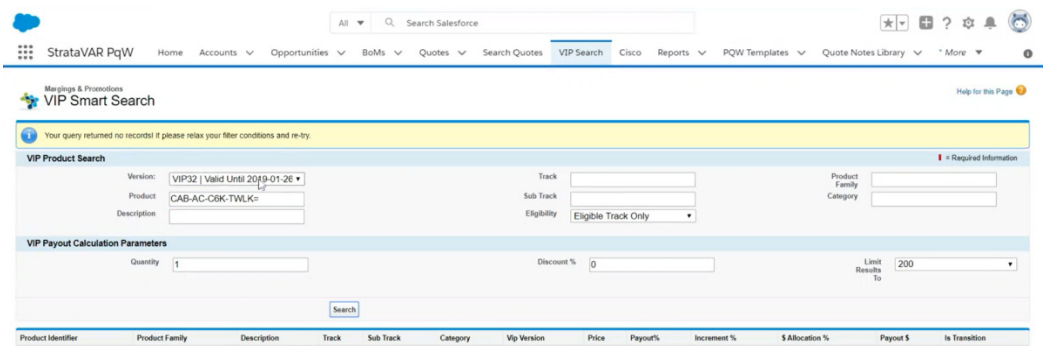


This area also provides forward and back arrow buttons that enable you to navigate from page to page, as well as to the first or last page.

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.

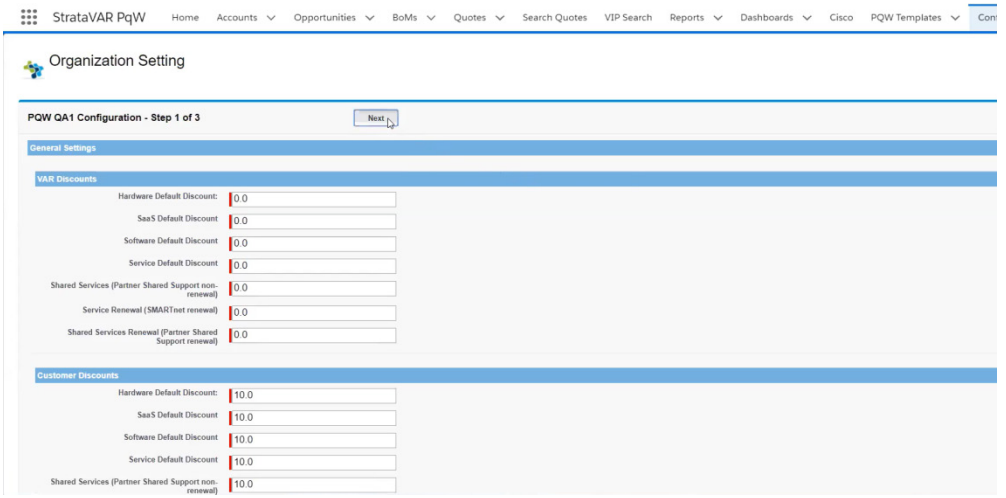
Product Identifier	Product Family	Description	Track	Sub Track	Category	Vip Version	Price	Payout%	Increment %	$ Allocation %	Payout $	Is Transition
MR33-HW	CNWRL	Meraki MR33 Cloud Managed AP	VIP ARCHITECTURE	MERAKI	I	VIP35	649	2	1.0	100	19	

Configuring VIP

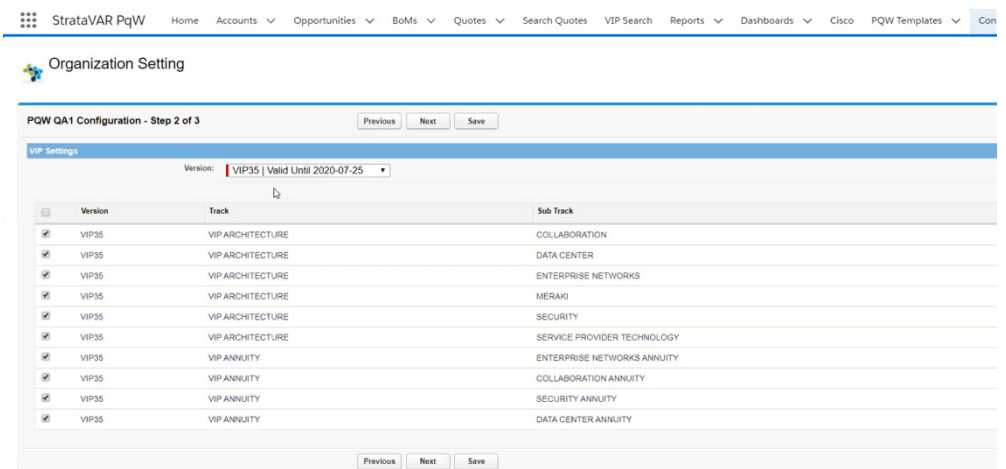
The VIP version must be configured before performing VIP calculations.

► 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 –

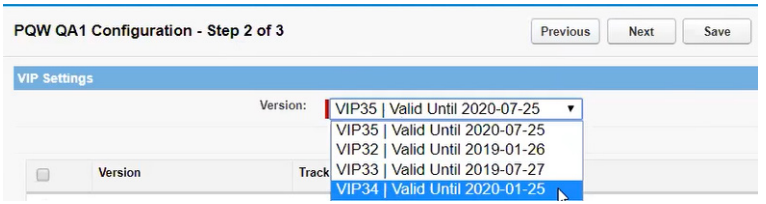


2 Click the **Next** button at the top of the window. The following displays. VIP settings are configured in Step **2** of PQW configuration.

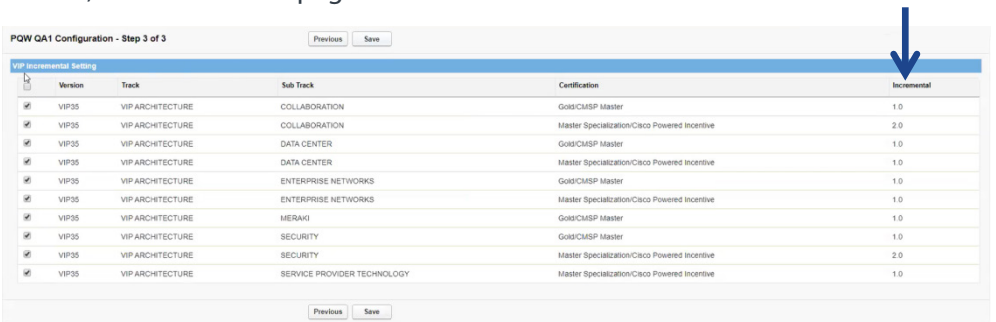


Each row in the table in this window represents a different VIP version-track-subtrack combination. For example, VIP35 has two different tracks – Architecture and Annuity. The Architecture track has multiple subtracks – Collaboration, Data Center, enterprise Networks and Meraki, Security and Service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

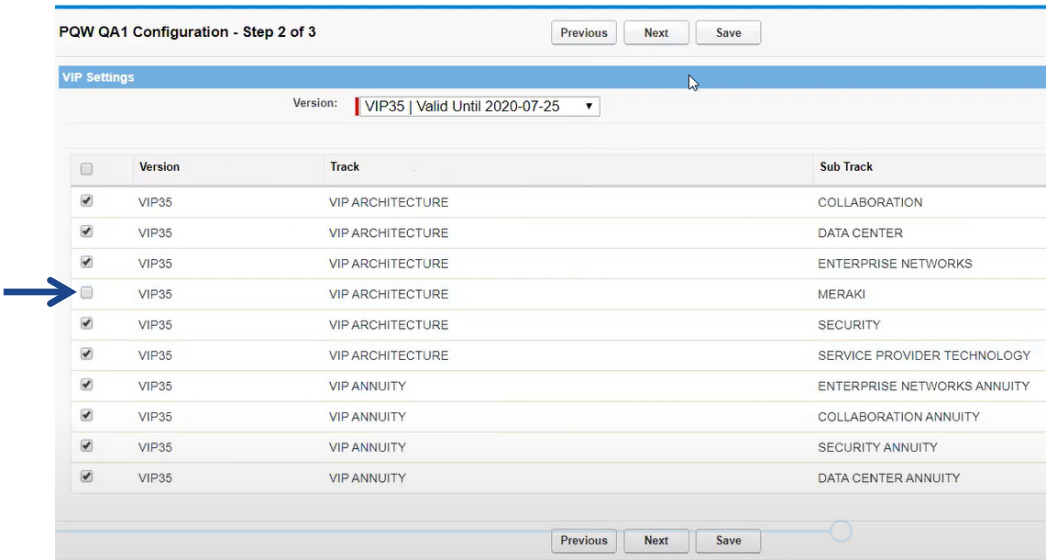


4 Click the **Next** button at the top of the window. This window shows the incremental percentage that Cisco rebates to a customer for each VIP version-track-subtrack combination (row) shown in Step **2** of the window. The **Incremental** column value is used to calculate the **Item Payout Rebate**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



Version	Track	Sub Track	Certification	Incremental
VIP35	VIP ARCHITECTURE	COLLABORATION	Gold/CMSP Master	1.0
VIP35	VIP ARCHITECTURE	COLLABORATION	Master Specialization/Cisco Powered Incentive	2.0
VIP35	VIP ARCHITECTURE	DATA CENTER	Gold/CMSP Master	1.0
VIP35	VIP ARCHITECTURE	DATA CENTER	Master Specialization/Cisco Powered Incentive	1.0
VIP35	VIP ARCHITECTURE	ENTERPRISE NETWORKS	Gold/CMSP Master	1.0
VIP35	VIP ARCHITECTURE	ENTERPRISE NETWORKS	Master Specialization/Cisco Powered Incentive	1.0
VIP35	VIP ARCHITECTURE	MERAKI	Gold/CMSP Master	1.0
VIP35	VIP ARCHITECTURE	SECURITY	Gold/CMSP Master	1.0
VIP35	VIP ARCHITECTURE	SECURITY	Master Specialization/Cisco Powered Incentive	2.0
VIP35	VIP ARCHITECTURE	SERVICE PROVIDER TECHNOLOGY	Master Specialization/Cisco Powered Incentive	1.0

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.



6 Click the **Save** button.

3

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

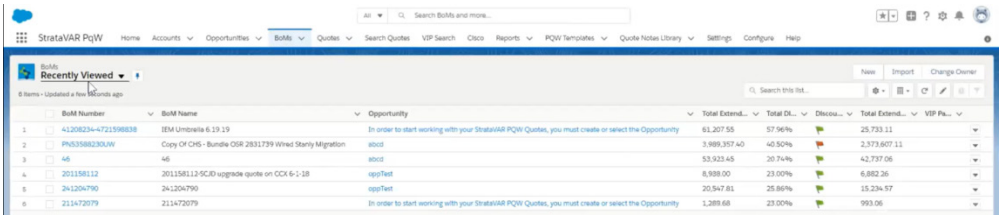
After a supplier source has been imported into StrataVAR PQW and becomes a BoM, it is not modified automatically by StrataVAR PQW, regardless of whether some or all of its items are added to a Quote in StrataVAR PQW.

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.

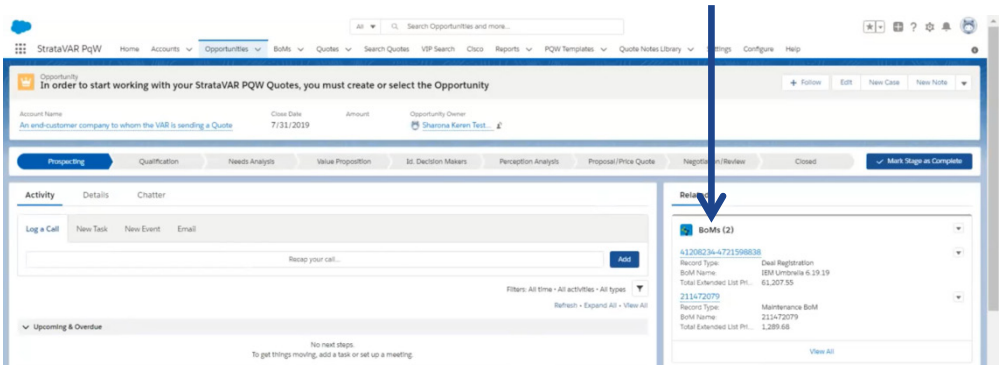
► To view or edit a BoM in StrataVAR PQW –

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.

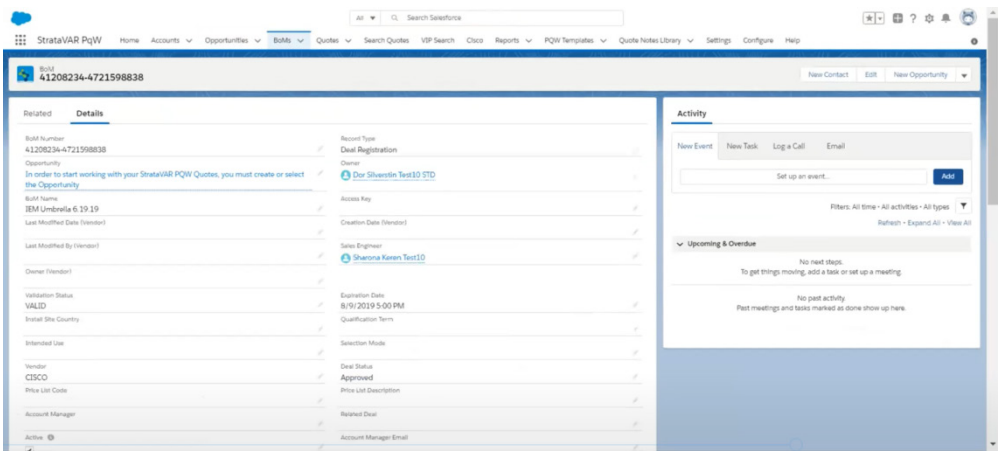


– OR –

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.



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



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

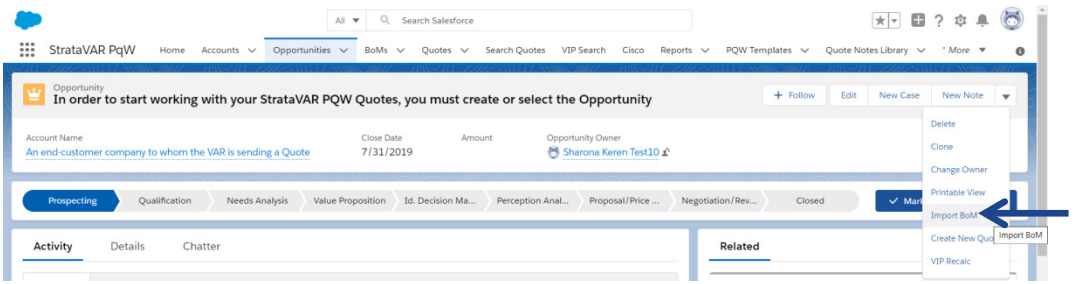
The importing of supplier sources into StrataVAR PQW in order to create BoMs comprises the following steps –

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

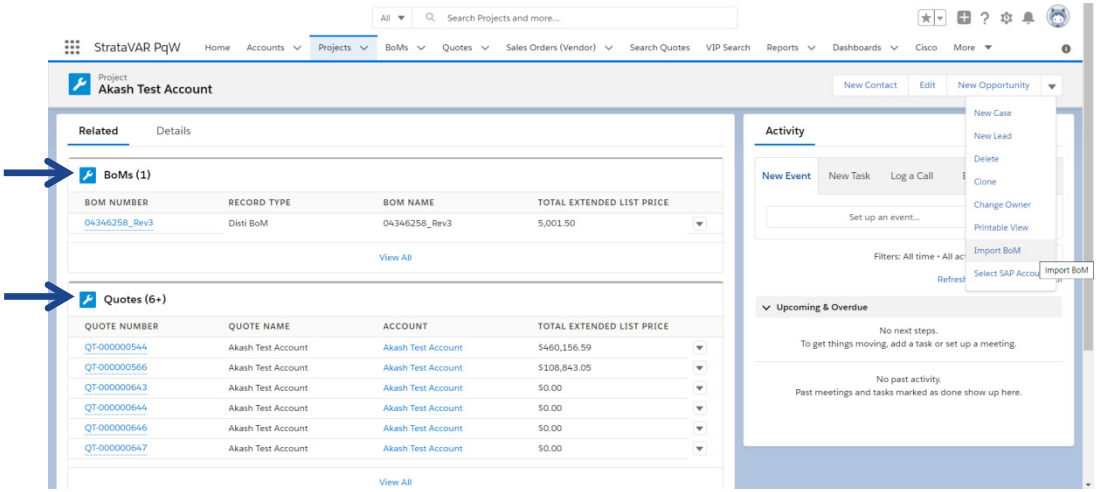
Clicking the Import BoM Button

▶ **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.

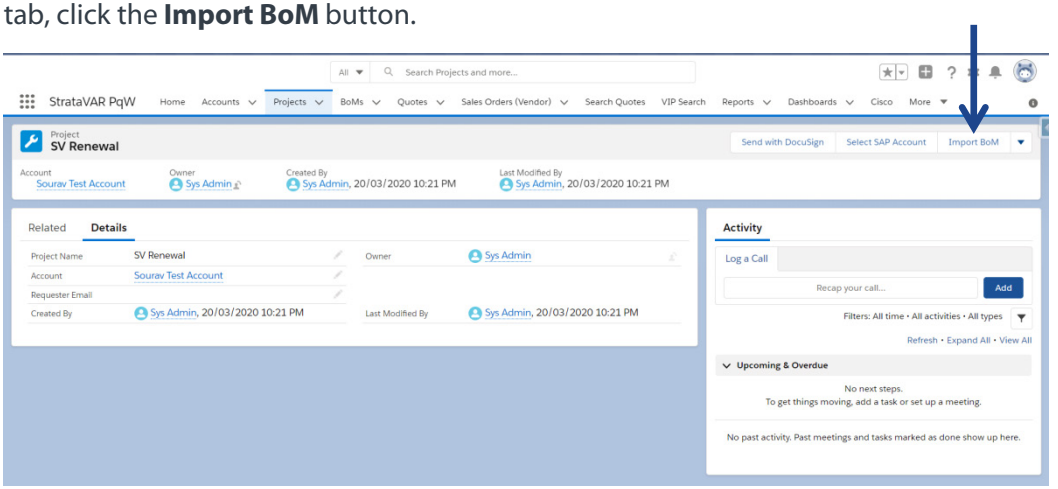


Note – The StrataVAR PQW BoMs and Quotes of this Opportunity appear as related lists as shown below –



– OR –

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



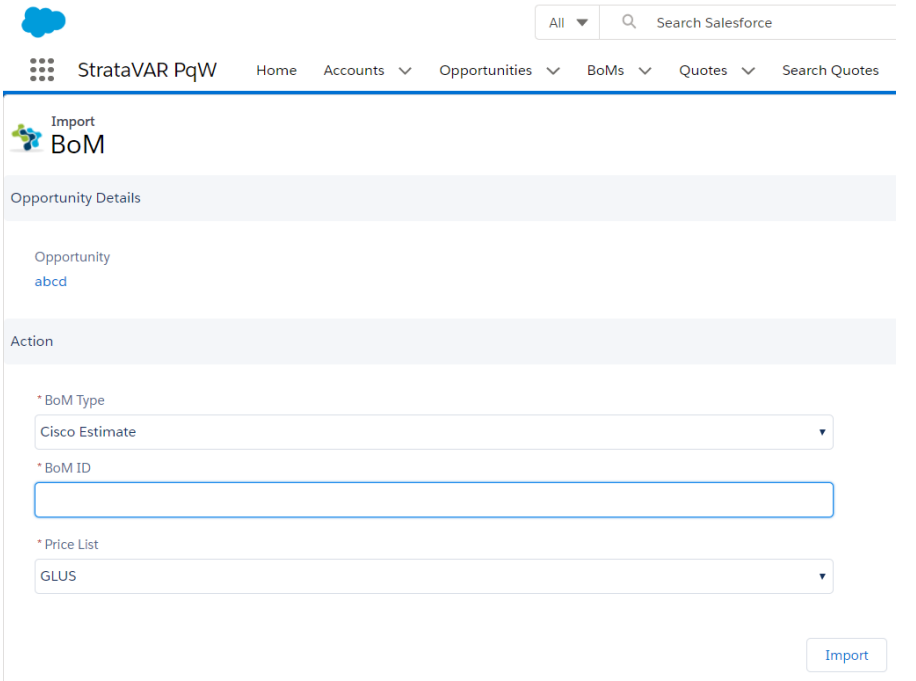
Note – The StrataVAR PQW BoMs and Quotes of this Project appear as related lists, as shown above.

Defining the BoM Type

The BoM type specifies the type of source.

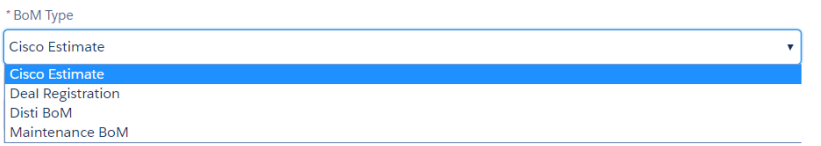
▶ To define the BoM type –

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.

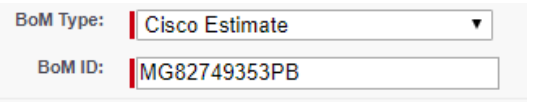
Generally, no preparation is required of these source files. StrataVAR PQW handles various formats of Disti BoMs. If it happens that you are trying to import a new unsupported Disti BoM format and you get an error message, then contact StrataVAR customer support for assistance.

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 –

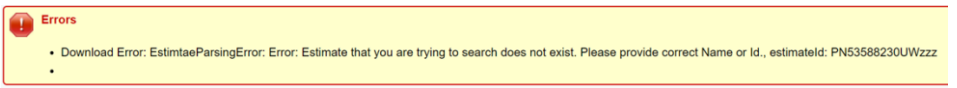
- **Cisco Estimate,** page 45
- **Deal Registration,** page 45
- **Disti BoM,** page 46
- **Maintenance BoM,** page 47

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.

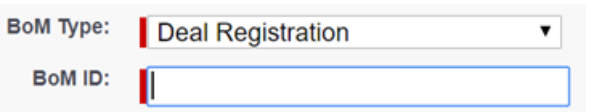


- **BoM ID –** Enter the CCW estimate ID. If the estimate ID that you enter here does not exist in CCW, then an error message is displayed. For example, as follows –



Deal Registration

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



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

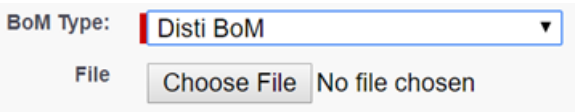
When importing an estimate, StrataVAR PQW uses the VAR Discount from the CCW estimate, if one is defined. If one is not defined, StrataVAR PQW uses account-level discounts for hardware and SMARTnet, if defined for the parent account. If this value is not defined for the Account, StrataVAR PQW uses global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

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

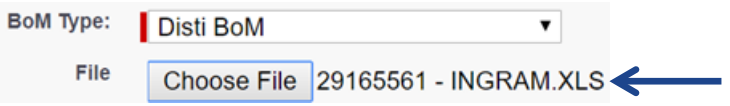
Disti BoM

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

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

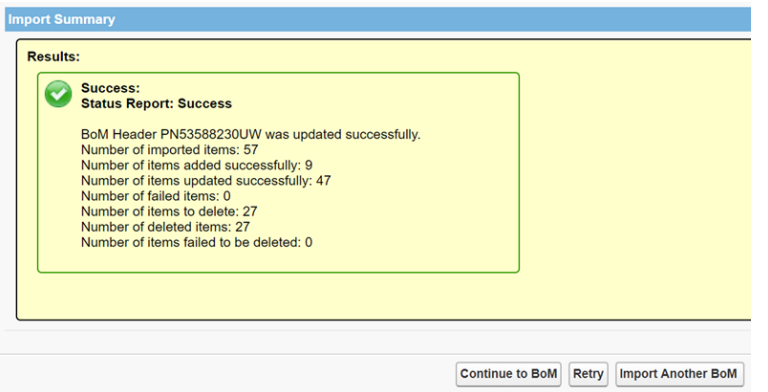


- **File –** Click the **Choose File** button in order to select an external Excel file from a distributor. This file must be in one of the Disti Excel sheet formats supported by StrataVAR PQW. The file name is then displayed –



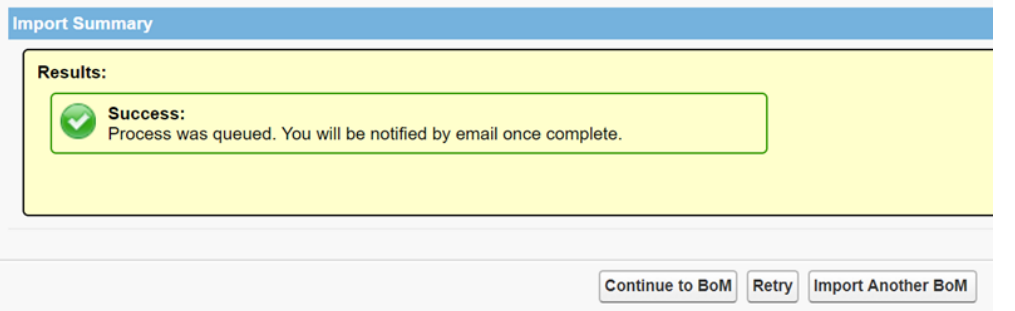
Long Cisco Estimates, Deal Registrations or Disti BoMs

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

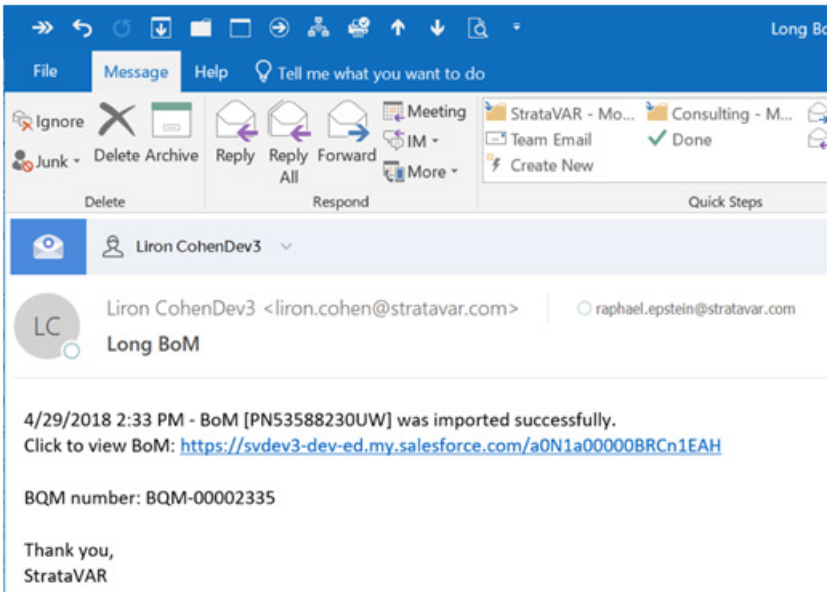


You can click the **Continue to BoM** button to display the imported items, or the **Import Another BoM** button to import another quote.

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



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



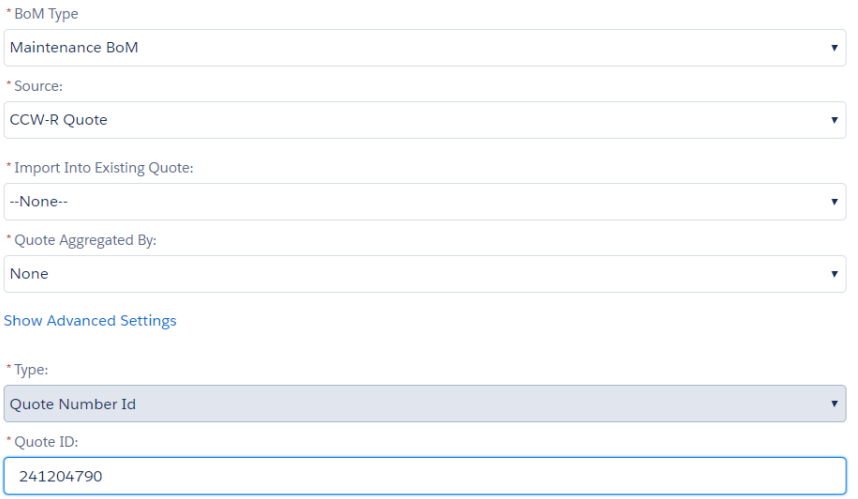
Maintenance BoM

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

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

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

See Handling of Maintenance BoMs.



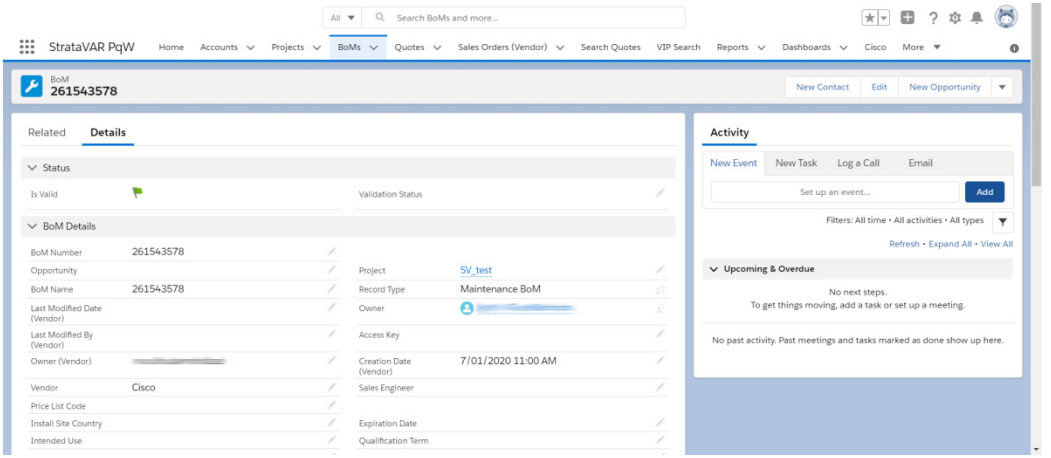
Clicking the Import Button

► 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.



3.3 BoM Details Tab

► To access BoMs Details –

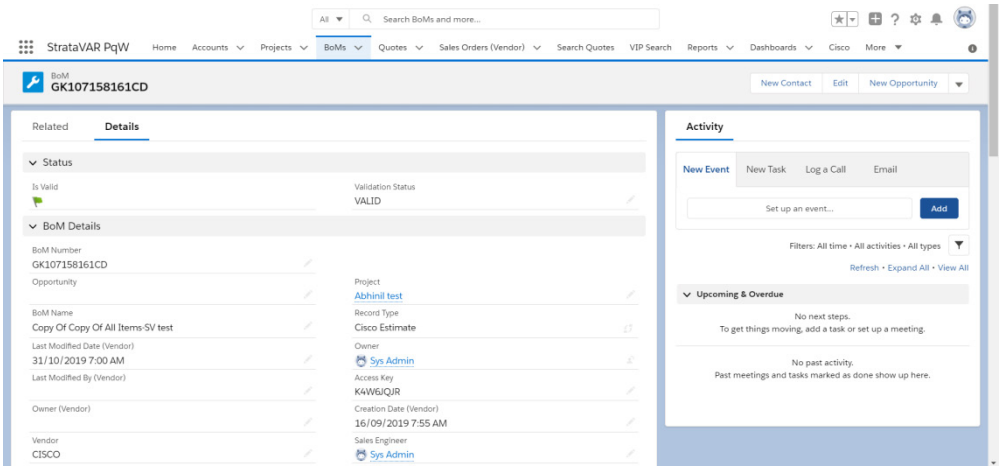
1. Select the **BoMs** tab to display a list of previously imported BoMs.

   – OR –

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

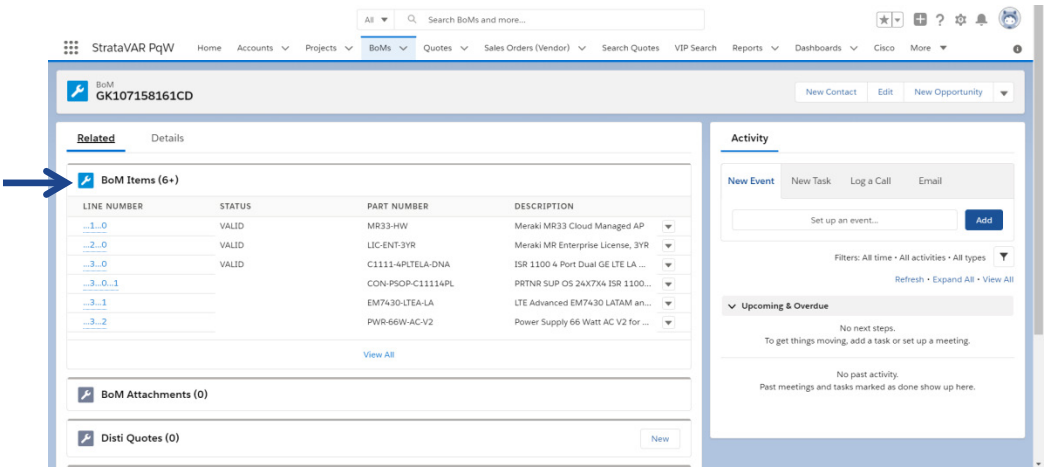
   You can also use the **Search** box at the top of the window to search for a BoM or another entity. Wildcards can be used in this field.

2 Click one of the BoM numbers in the list.

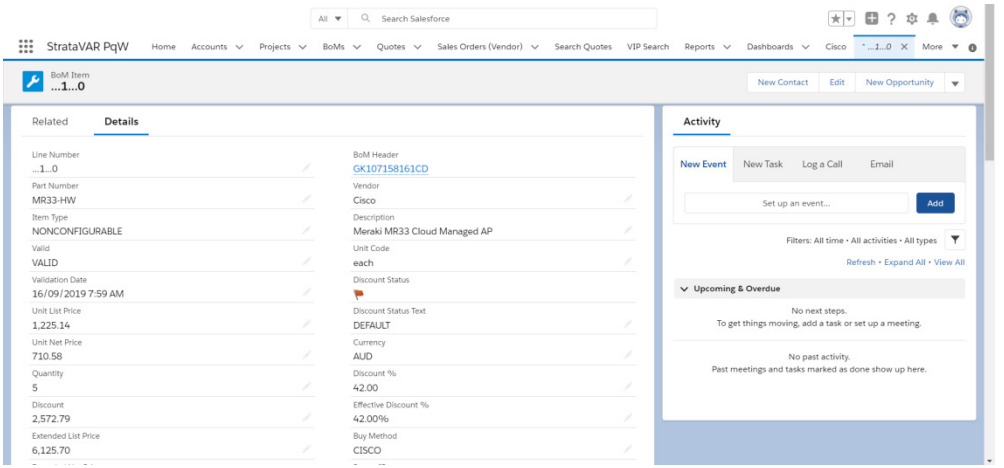


Note – The layout of this page may appear differently than shown above, because you can customize the layout to specify which fields are displayed and their location on the page.

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



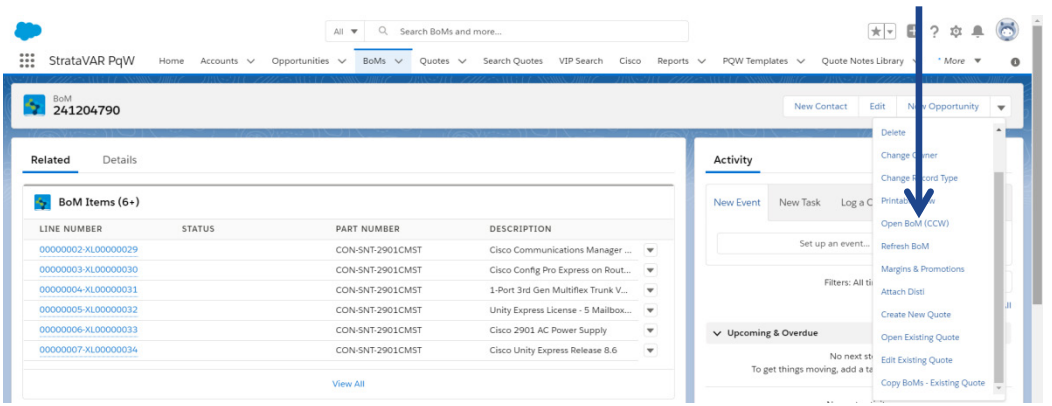
3 To display the details of a specific item in the BoM, click one of the **Line Numbers** in the BoMs items related list. The following displays –



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

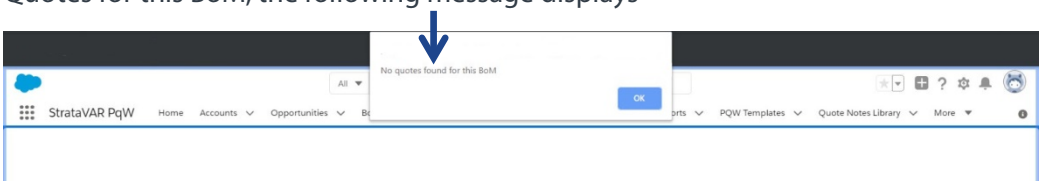
Attaches a Quote from distributors in a known format, in order for PQW to automatically parse the information. See Disti BoM for more details about the Distis supported by PQW.

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.

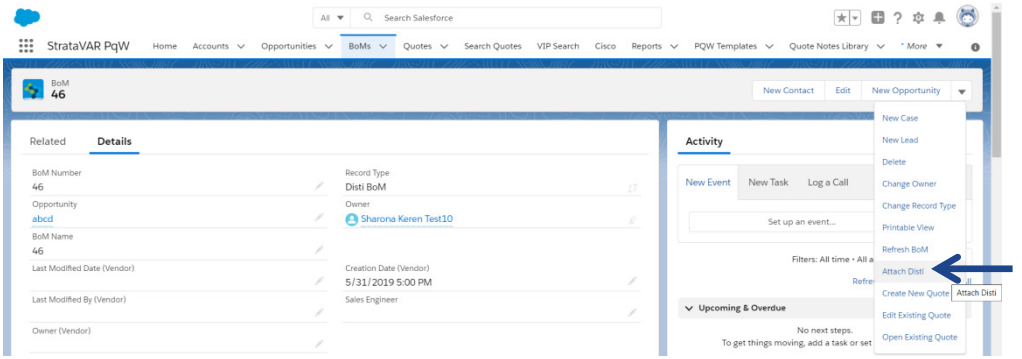
The purpose of a Disti Quote Merge is to compare the quote received from a Disti with the original CCW BoM (downloaded from Cisco) in order to ensure that **all** the same items exist and that the quantities are identical and correct. This merge and comparison enables you to identify discrepancies and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

Import Format

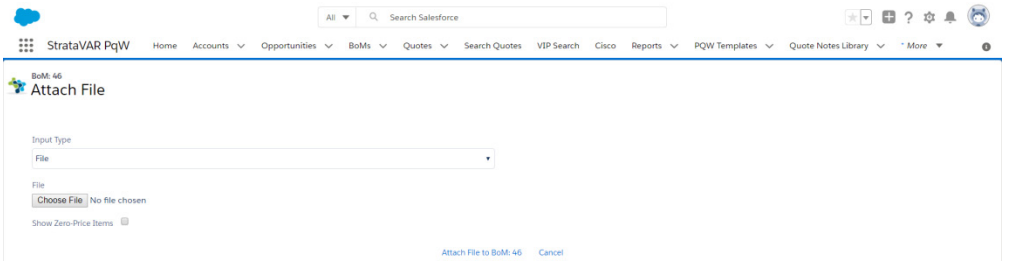
StrataVAR PQW is provided with the ability to parse various types of input formats, whether they are received electronically using an API or imported from an Excel file. These formats are listed on page 14.

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

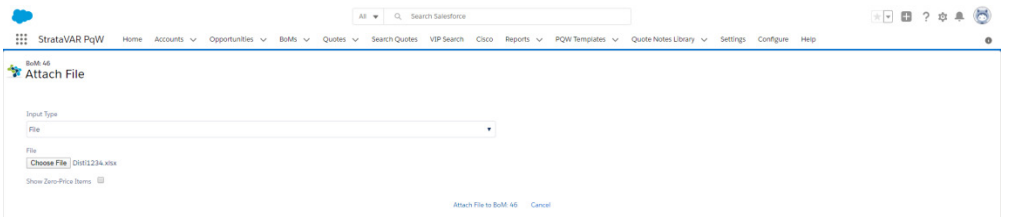
1. Import the Source BoM, which can be either a CCW Estimate or a CCW Quote.
2. Open the BoM Details page of this BoM.
3. Click the **Attach Disti** button.



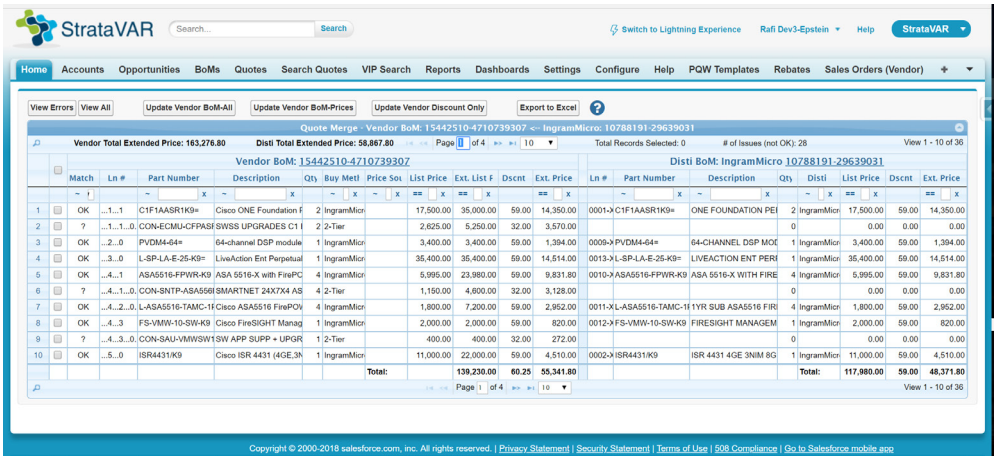
The following displays –



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 –

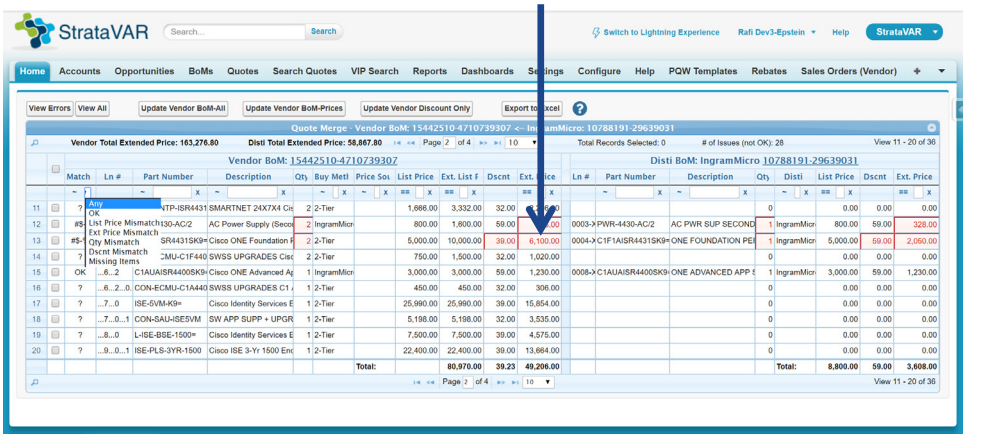


- **Original BoM (Left) –** The left side of this window shows the original BoM in PQW, as imported from CCW.
- **Disti Quote (Right) –** The right side of this window shows the quote received from the Disti.
- Only non-zero price items are shown, because the Disti does not provide them anyway.
- The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

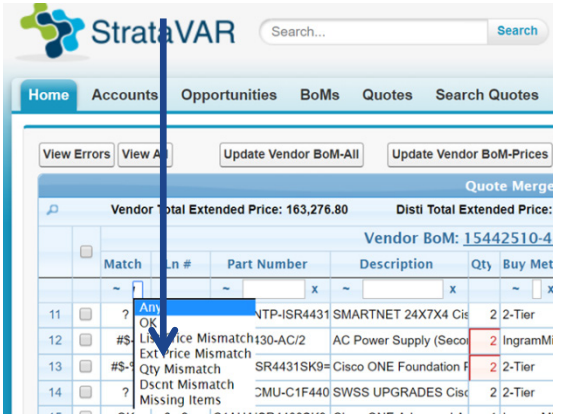
  OK – Indicates that they match. A symbol indicates a discrepancy to be handled by you, as follows –

  - **#** – 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 –



- 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 –



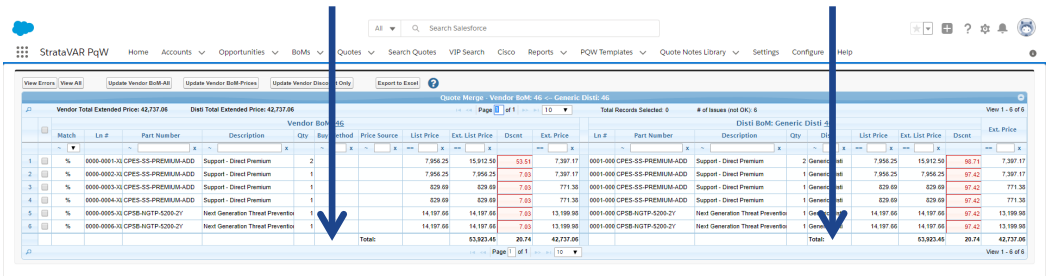
6 According to how you evaluate the discrepancy, select the checkbox of the discrepancy records to be handled and then use one of the following three buttons. Each button merges some of the Disti quote values into the StrataVAR PQW BoM in a different manner –

- **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.

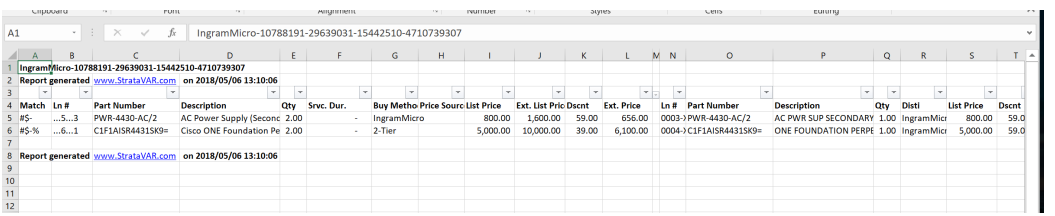
Export Excel

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**.



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 –

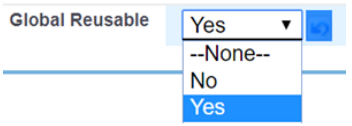


3.3.3 Defining a BoM as Reusable

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 –**

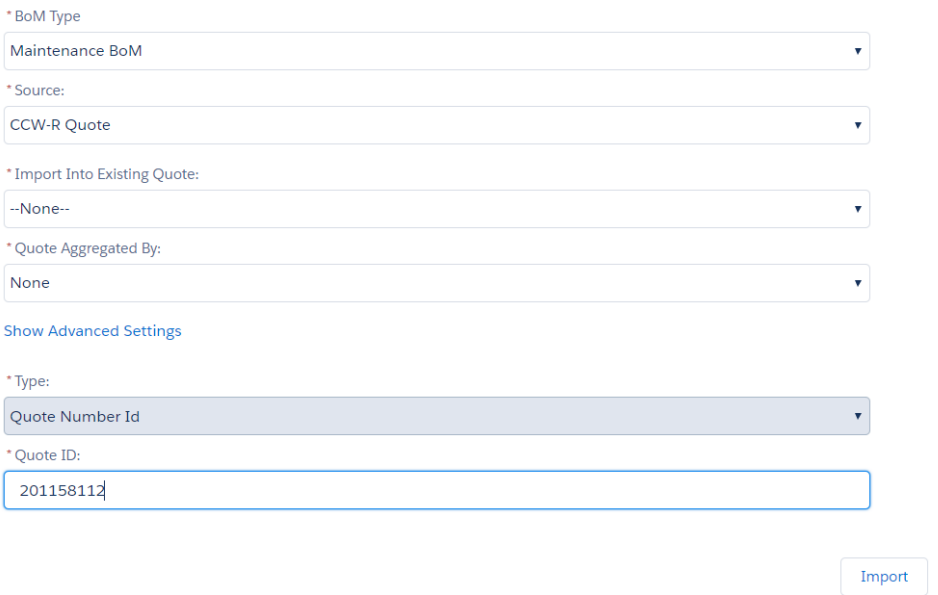
1. Import a source quote in order to create a BoM.
2. Edit the BoM.
3. Change the **Global Reusable** field to **Yes**. For more details, see Selecting and Copying BoM Items into the Quote.



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 two-stage process was required for handling the other three types of BoMs (Cisco Estimate, Deal Registration and Disti 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.

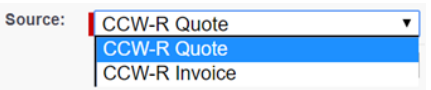
As a result, at the end of this batch process, one email notification is sent to indicate the following–

- **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

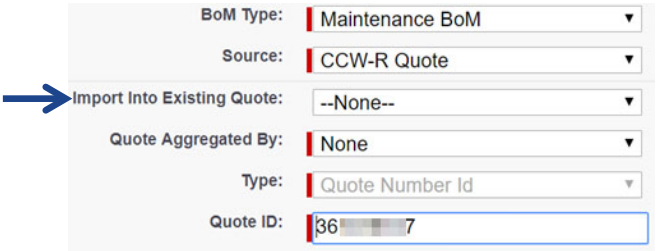
► **To define a maintenance BoM –**

- In the **Source** field, shown on page 44, from the dropdown menu, select either **CCW-R Quote** or **CCW-R Invoice** –

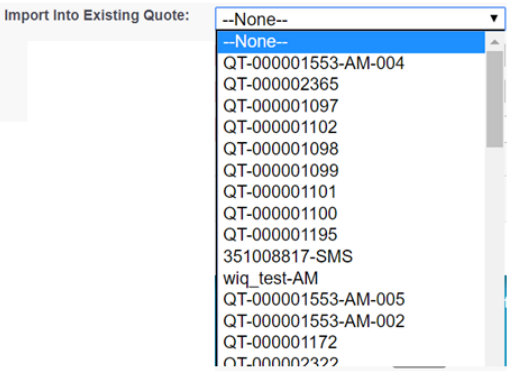


  - **CCW-R Quote –** This type of quote is typically a tier 1 Partner, which is also called a DVAR (Direct VAR).
  - **CCW-R Invoice –** This type of quote is typically a tier 2 Partner.
  - To import this BoM into a new Quote in StrataVAR PQW, in the **Import into Existing Quote** field, select the **–None–**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



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.



Defining Quote Aggregation for a Maintenance BoM

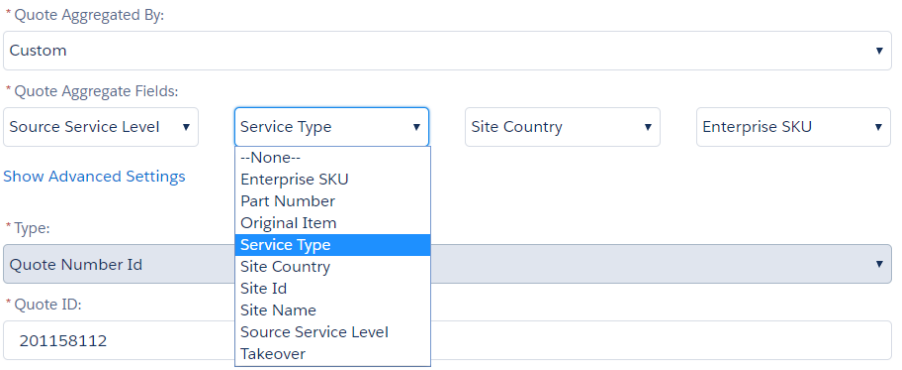
The following applies to both a **CCW-R Quote** or **CCW-R Invoice Maintenance BoM**.

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

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

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

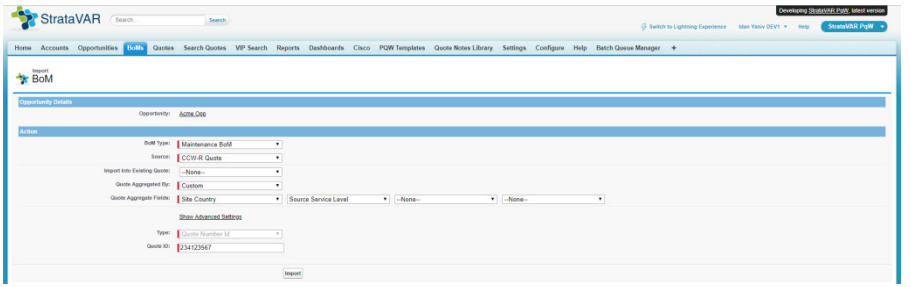
- **None –** No automatic aggregation is performed. This means that the import of 10,000 BoM items results in 10,000 items in the StrataVAR PQW Quote.
- **All –** The entire BoM is imported as a single Quote item. This means that the import of 10,000 BoM items results in a single item in the StrataVAR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



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

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

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



Example 2 – Aggregation by Service Level

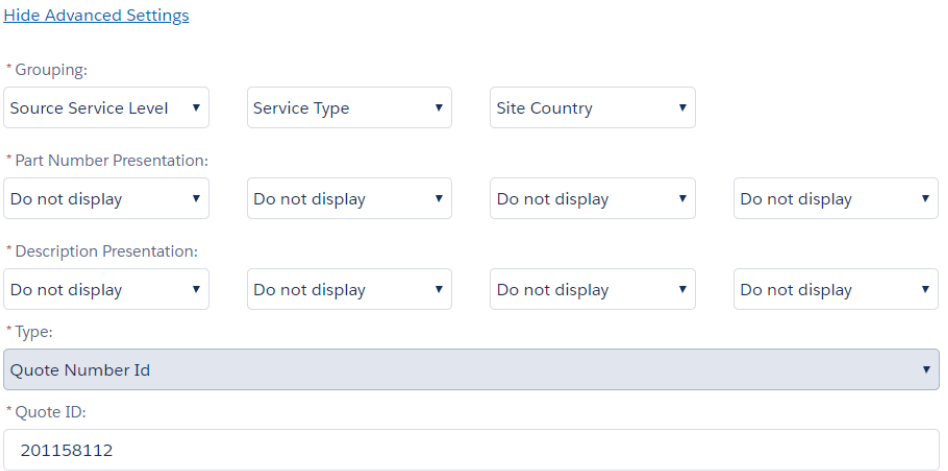
The following table shows an example of four items in a BoM and then explains how they would be aggregated for each option that you might select in the **Quote Aggregated By** field.

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

- If **None** was selected in the **Quote Aggregated By** field, then the Quote will contain six items – with the prices **10**, **30, 70, 80, 40** and **20**.
- If **All** was selected in the **Quote Aggregated By** field, then the Quote will contain a single item with the price **250**.

- If **Custom** was selected in the **Quote Aggregated By** field and the property **Service Level & Takeover** was selected in the **Quote Aggregate Fields** field, then the Quote would contain four items – **SNT:YES**, **SNT:NO, EMC: YES, EMC:NO**– with the prices **40, 70, 80** and **60.**

  - **Show Advanced Settings –** Click this option to show advanced settings that enable you to define how various items in the Quote appear, as follows –



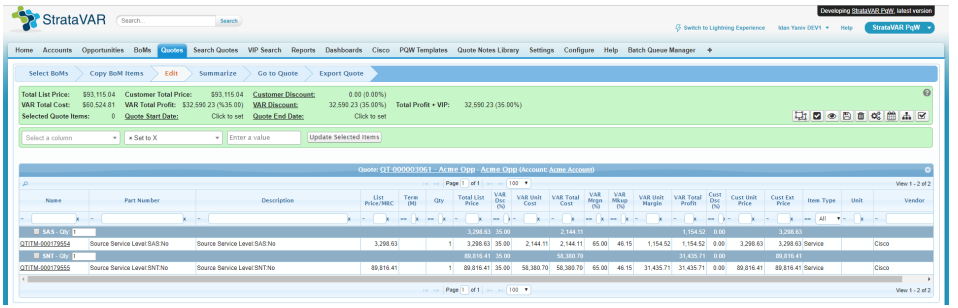
    - **Grouping –** The **Quote Aggregated by** field (described above) enables you to define how items are automatically grouped in the Quote. The **Grouping** option enables you to specify for each aggregation breakdown (meaning each of the four dropdown fields described above) whether the associated 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**.

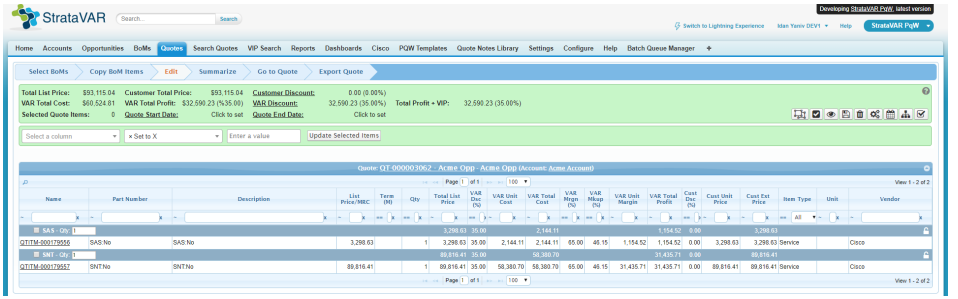
- **Show No Label –** The summary item shows the common denominator value of the items being summarized without a label. For example, the two **Service Level** summary items would appear – one showing **SNT** and the other showing **EMC**.
- **Do Not Display –** The summary item appears, but does not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

- **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 –



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



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

3.4.3 CCW-R Invoice

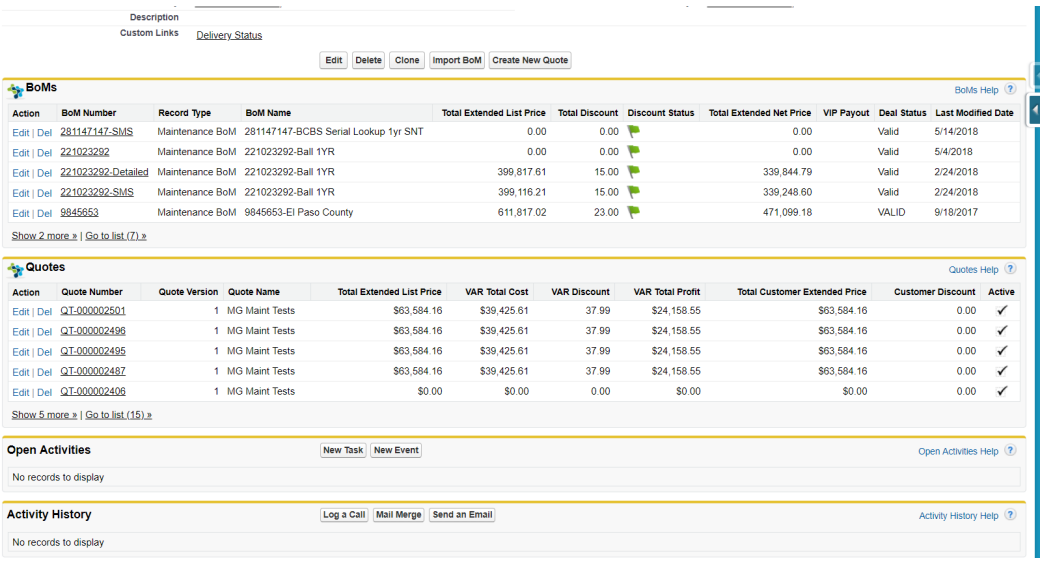
This type of Quote is typically a tier 2 Partner. Selecting and defining the import of a **CCW-R Invoice** into StrataVAR PQW is very similar to for **CCW-R Quote**, as described above. The primary difference is regarding the StrataVAR PQW BoM and Quote that is generated.

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
Edit | Del	281147147-SMS	Maintenance BoM	281147147-BCBS Serial Lookup 1yr SNT	0.00	0.00		0.00		Valid	5/14/2018
Edit | Del	221023292	Maintenance BoM	221023292-Ball 1YR	0.00	0.00		0.00		Valid	5/4/2018
Edit | Del	221023292-Detailed	Maintenance BoM	221023292-Ball 1YR	399,817.61	15.00		339,844.79		Valid	2/24/2018
Edit | Del	221023292-SMS	Maintenance BoM	221023292-Ball 1YR	399,116.21	15.00		339,248.60		Valid	2/24/2018
Edit | Del	9845653	Maintenance BoM	9845653-El Paso County	611,817.02	23.00		471,099.18		VALID	9/18/2017

Show 2 more » | Go to list (7) »

Quotes Quotes Help

Action	Quote Number	Quote Version	Quote Name	Total Extended List Price	VAR Total Cost	VAR Discount	VAR Total Profit	Total Customer Extended Price	Customer Discount	Active
Edit | Del	QT-000002501	1	MG Maint Tests	$63,584.16	$39,425.61	37.99	$24,158.55	$63,584.16	0.00	✓
Edit | Del	QT-000002496	1	MG Maint Tests	$63,584.16	$39,425.61	37.99	$24,158.55	$63,584.16	0.00	✓
Edit | Del	QT-000002495	1	MG Maint Tests	$63,584.16	$39,425.61	37.99	$24,158.55	$63,584.16	0.00	✓
Edit | Del	QT-000002487	1	MG Maint Tests	$63,584.16	$39,425.61	37.99	$24,158.55	$63,584.16	0.00	✓
Edit | Del	QT-000002406	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.

4

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

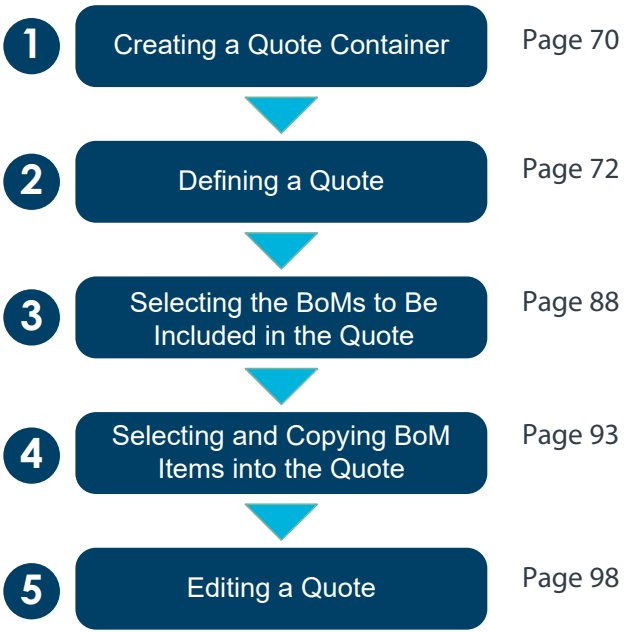
As the first step of using StrataVAR PQW to generate customer-facing PQW Quotes, we imported source data from suppliers into PQW and created BoMs, as described in *Chapter 3, Importing Sources – Creating BoMs* on page 39.

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.

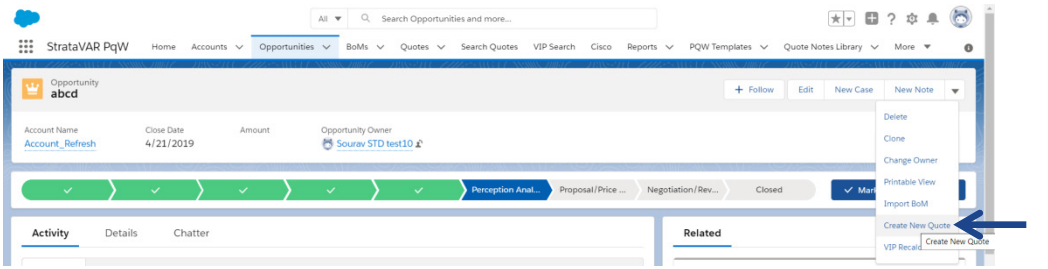
► To create a Quote from the Opportunities/Projects tab –

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–

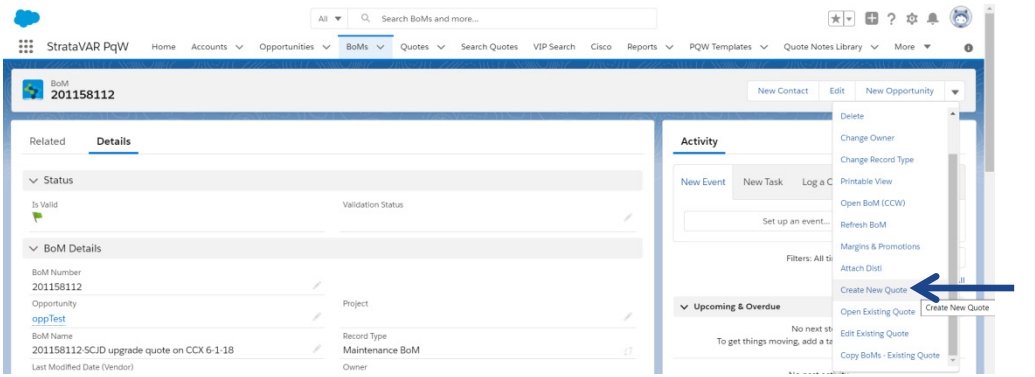
   To display a Project, click the **Project** tab at the top of the window, and then click a Project to display the **Project Details** tab.

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.



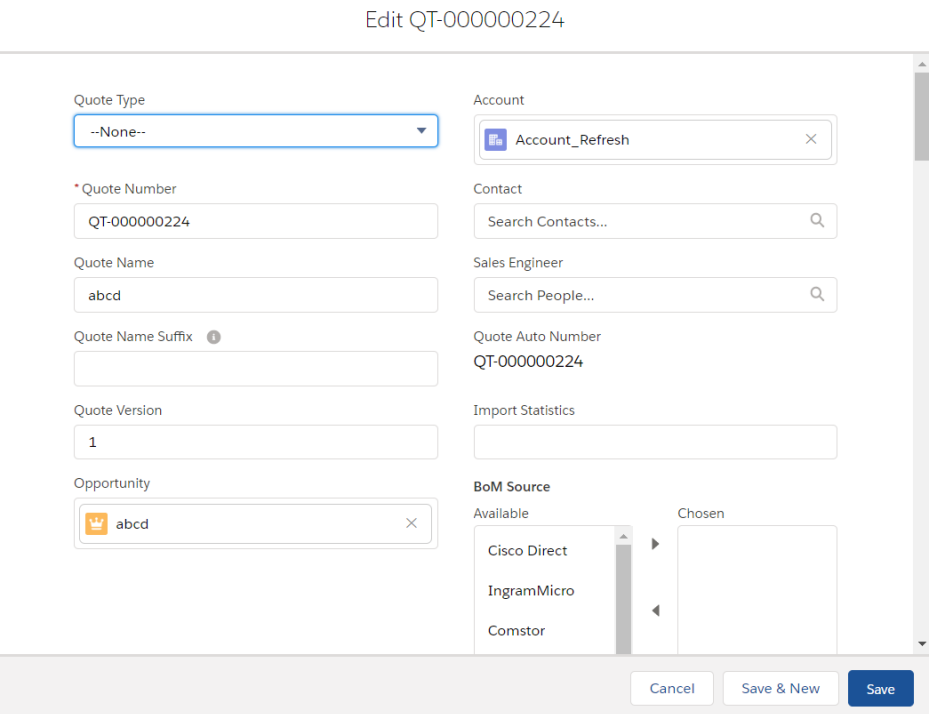
4.4 Defining a Quote

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.

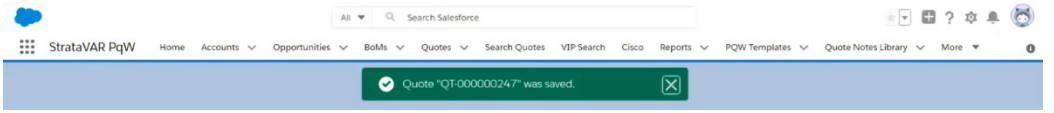
The data that you enter here can be exported into the customer-facing Quote or not, according to the StrataVAR PQW template that you select, as described in page 125. Therefore, you can use some of these fields for internal management/information purposes, because they are not defined to be exported into the customer-facing Quote.

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



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

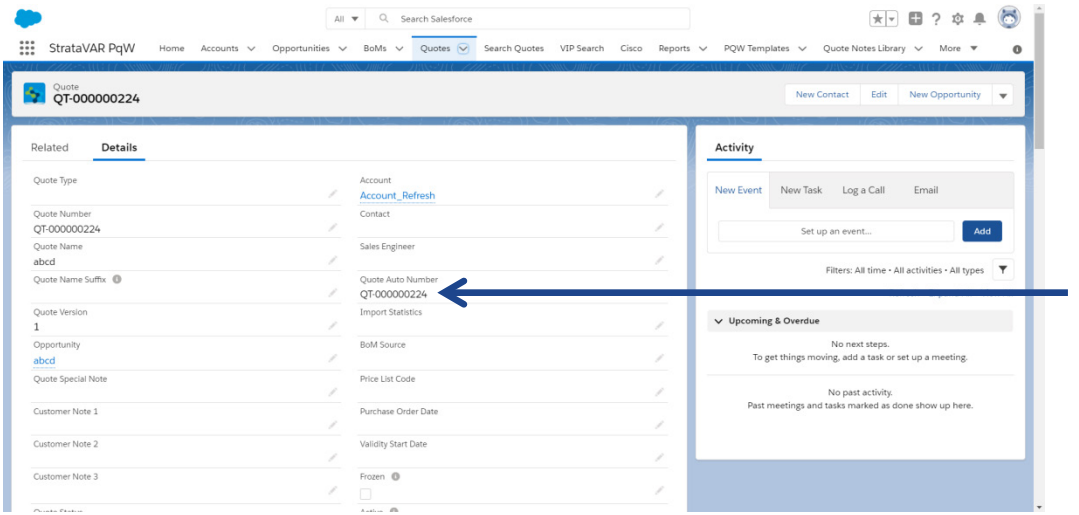
Fill in the displayed fields (as described below) and then click the **Save** button. A confirmation message displays –



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.

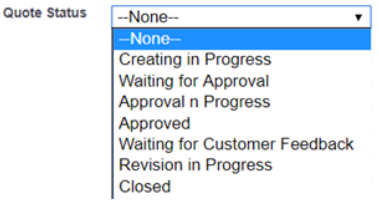
Quote Special Note and Customer Note 1, 2, 3

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

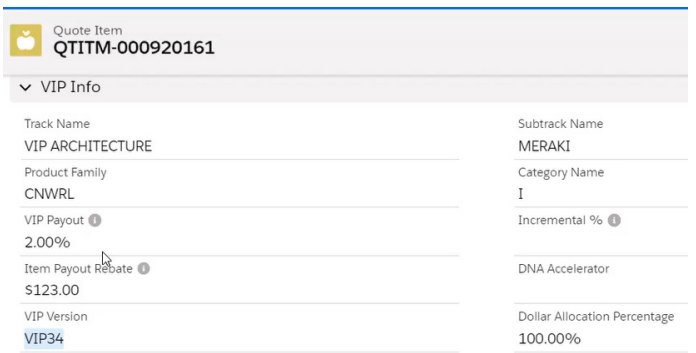
This field indicates the date to use for VIP calculations. VIP calculations are based on a specific VIP version. VIP versions are active for a period of three months or six months. The **VIP Effective Date** must fall within the date range covered by the VIP version that you want to use. For example, 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.

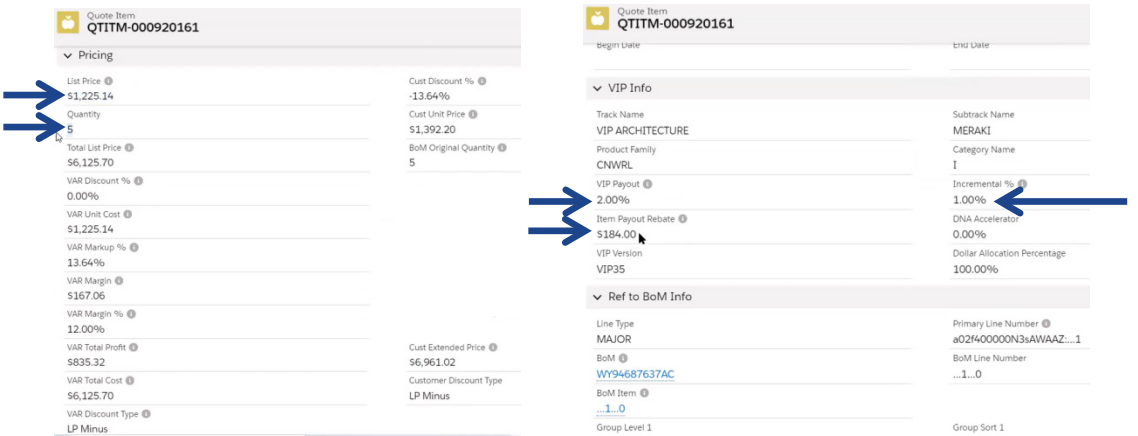
VIP Payout

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 is 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.

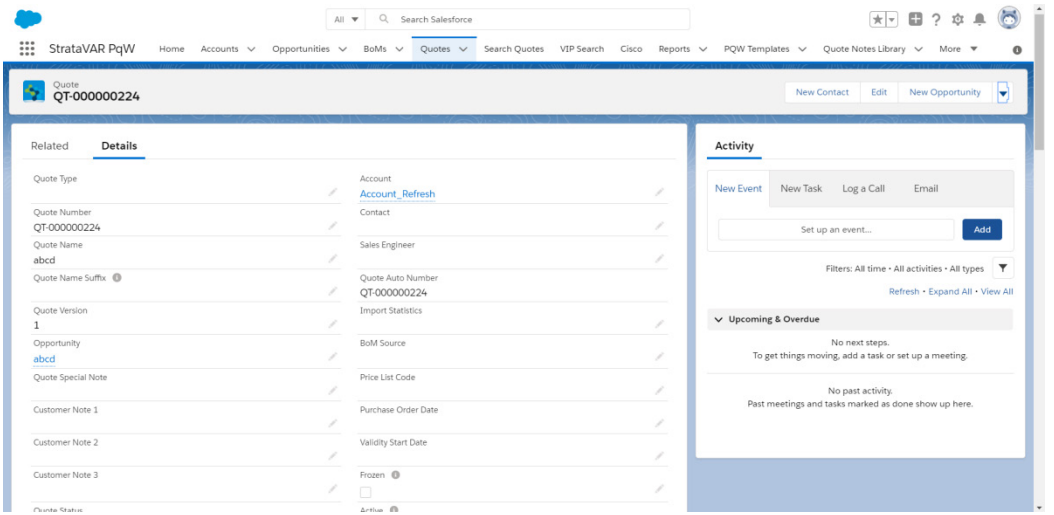


Let's look at an example in more detail. Let's assume that the **List Price** for a Quote is $1,225.14, with a **Quantity** of 5, a **VIP Payout** of 2.00 % and an **Incremental %** of 1.00%.



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 –



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
QTITM-000028664	CAB-AC-C6K-TWLK=	10	$450.00
QTITM-000028665	GLC-SX-MMD=	5	$2,500.00
QTITM-000028666	SFP-10G-LRM=	44	$48,400.00
QTITM-000028667	SFP-GE-S-RF	1	$332.00
QTITM-000028668	WS-C4506E-S7L+96V+	10	$180,000.00
QTITM-000028669	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
New Special Note	✓		Sharona Keren Test10	Prof Service

The Quote Notes Library enables you to –

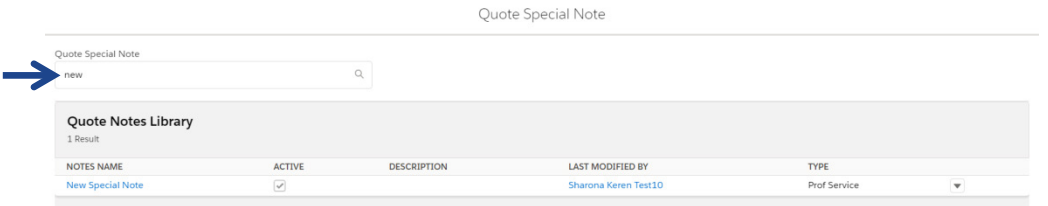
- Maintain consistency among users and quotes.
- Store structured text in the PQW database, making it more manageable and auditable.

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.

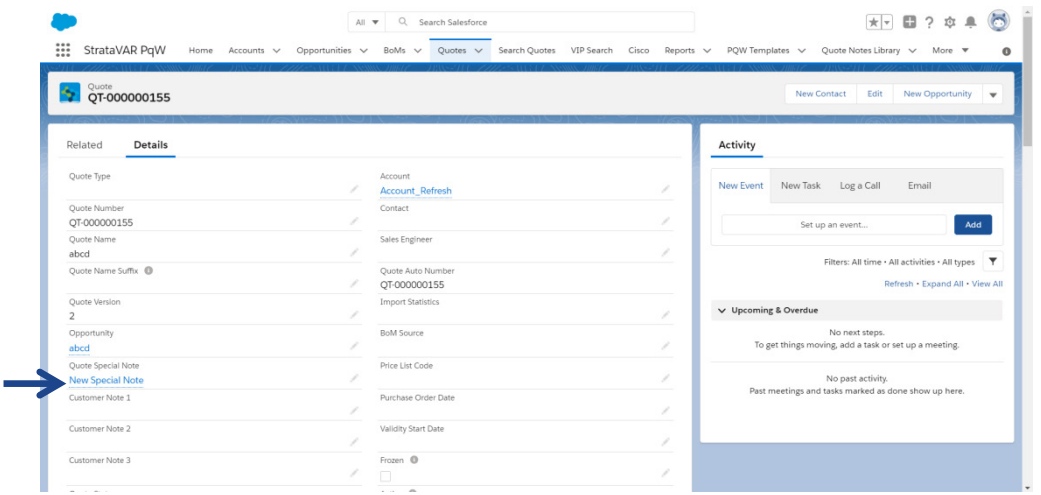
Quote Templates should be defined with the correct codes to embed the specific Quote Note(s). The Quote Note is then copied to Excel and saved with the Excel Quote in PQW. If the Quote Note is updated at a later point in time, it is not reflected in the saved Excel Quote.

▶ 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.

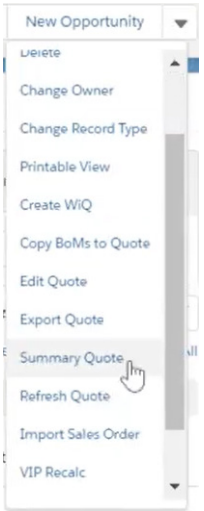


2 Click the row of the note to be added to the Quote in the dropdown menu. The note is added to the Quote and displays as a link in the **Quote Special Note** field, as shown below –



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

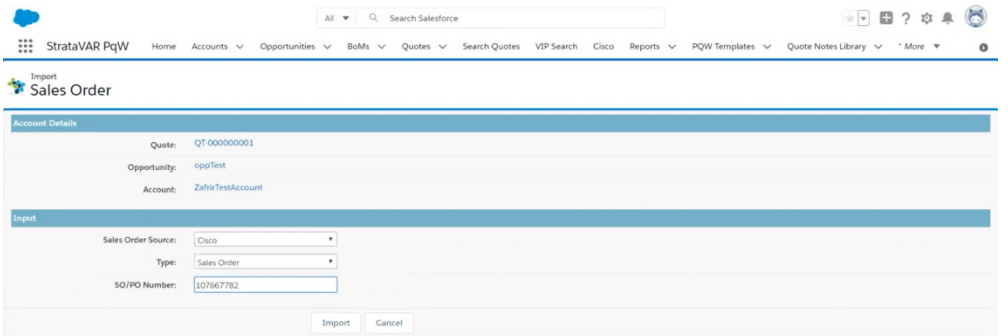
Refreshes a Quote. For more detail, see *Chapter 7*, *Refresh Options* on page 131.

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 –



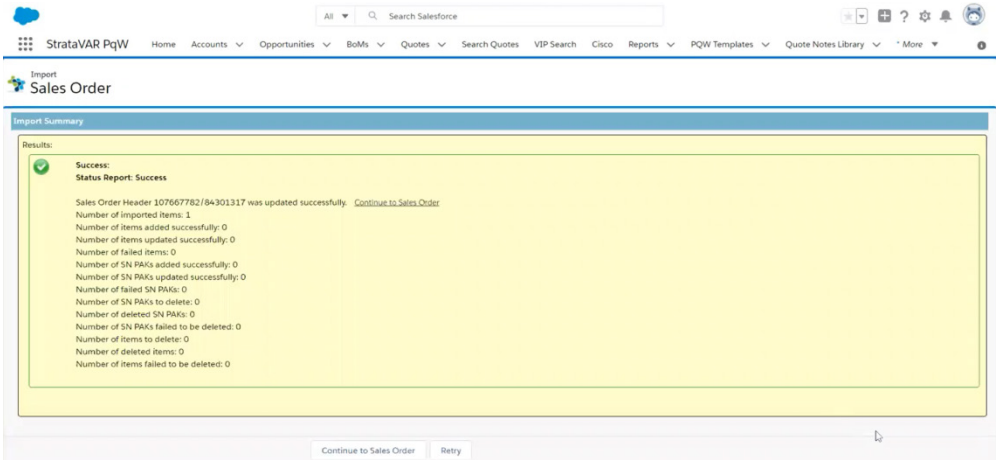
The Account Details area shows the details for the Quote of interest.

2. In the Input area, fill in the following fields –

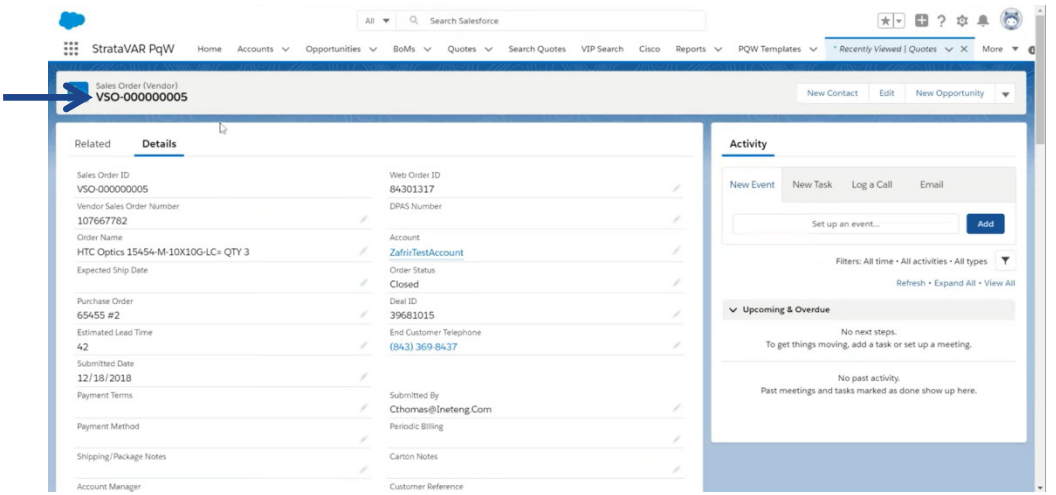
   - **Sales Order Source –** Select the source of the sales order in the dropdown list. Possible values are **Cisco** and **Ingram**.
   - **Type –** Specify the type, which can be **Sales Order**, **Purchase Order** or **Web Order ID**.
   - **SO/PO Number –** Specify the number of the Sales Order or 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 –

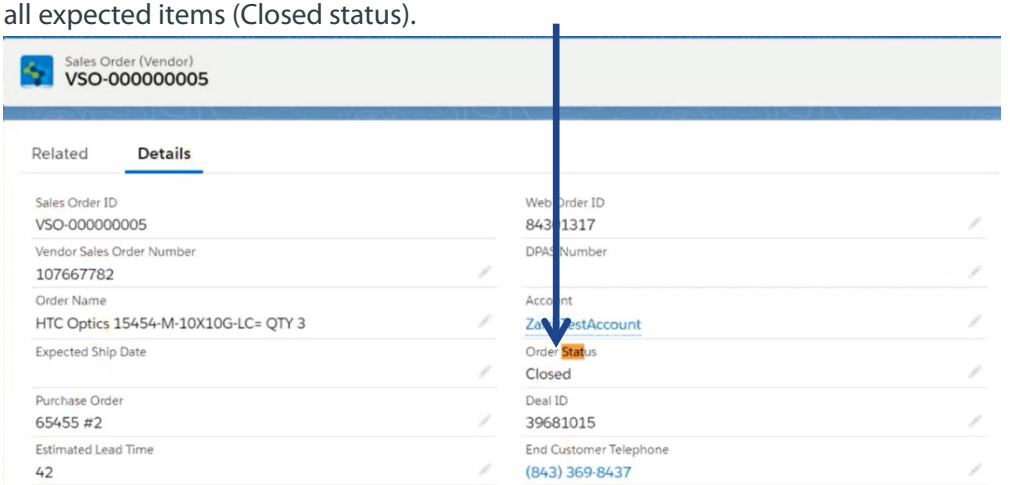


4 Click **Continue to Sales Order** to view the sales order. The following displays –

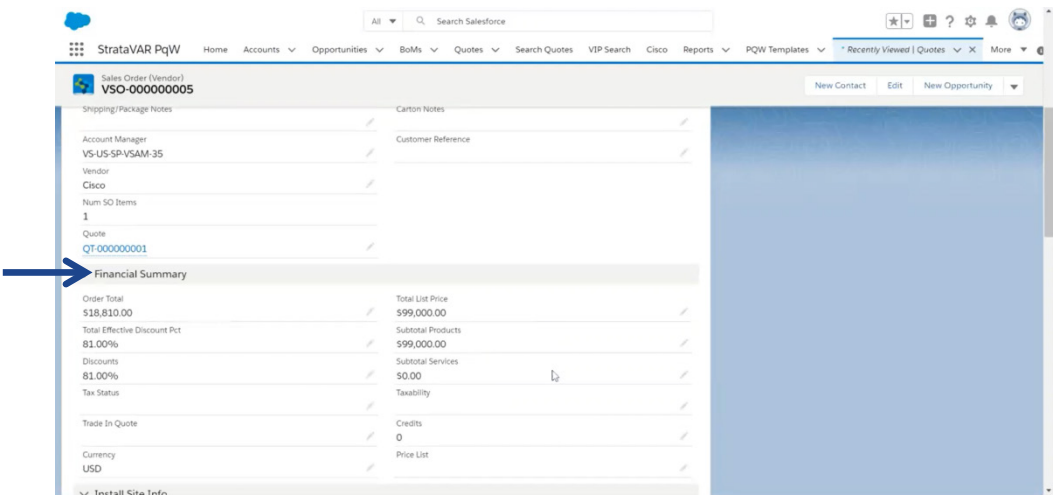


The sales order ID displays at the top of the window.

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



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



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.

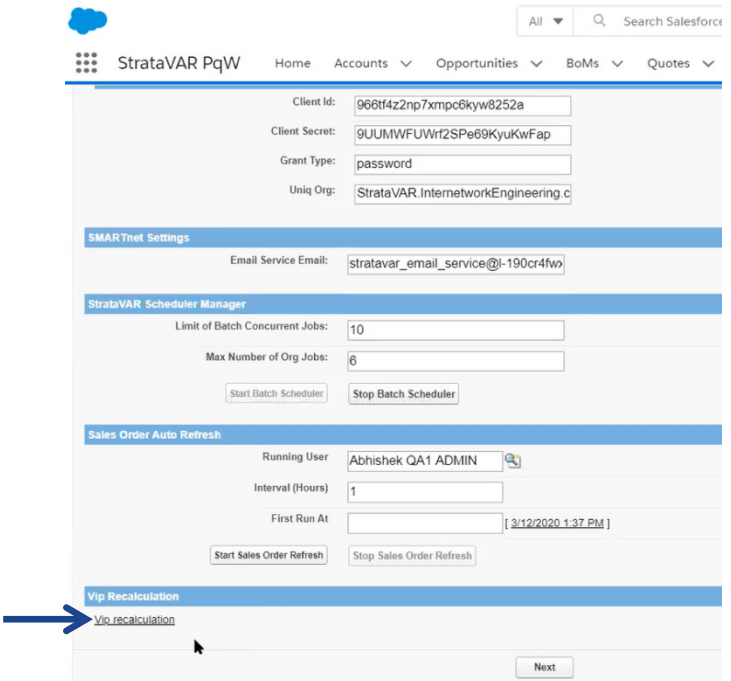
VIP Recalc Button

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.

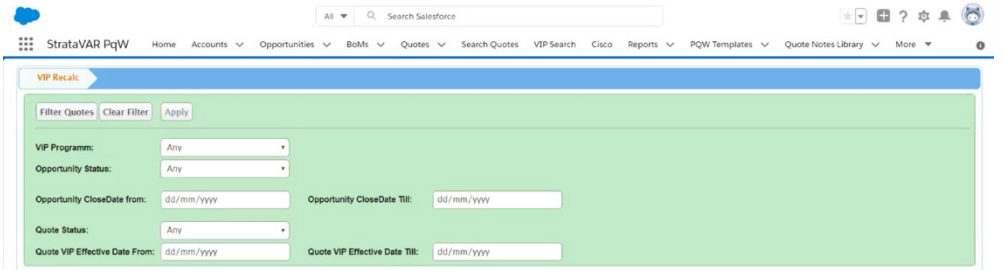
Use the **VIP Recalc** button to recalculate the VIP on one or more Quotes simultaneously using a filtering mechanism. For example, let's say that VIP 34 expired on January 27 and that thereafter VIP 35 was rolled out. However, some users did not configure their VIP 35 settings, and therefore all the 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.



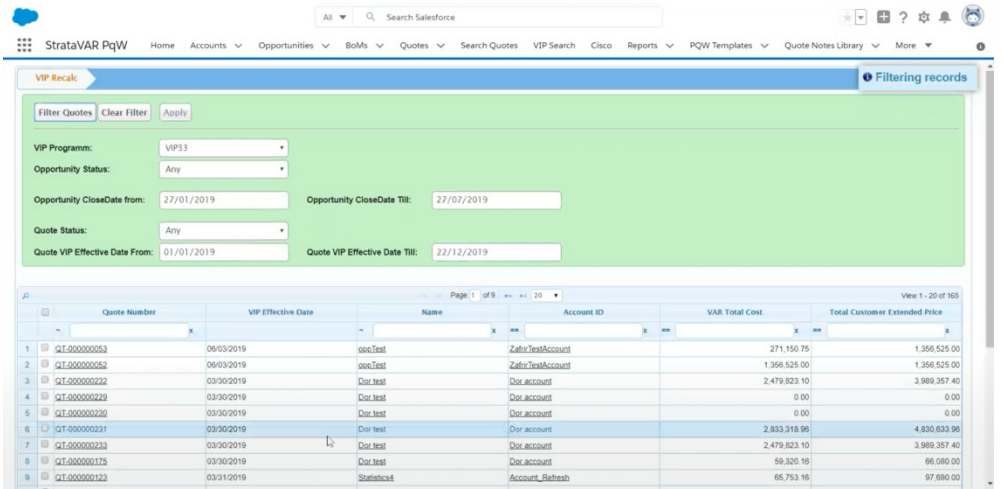
The following displays –



2 Click the **Filter Quotes** button to define the Quote filters and then specify the filters, as follows –

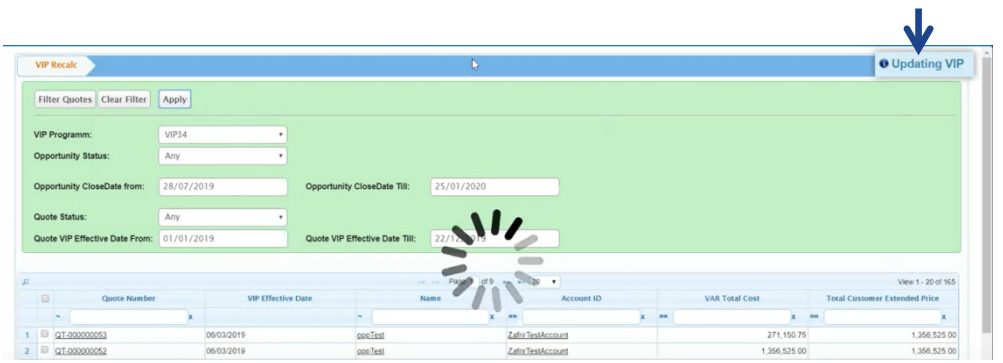
- **VIP Program –** Select the applicable VIP program. The VIP program in which you participate is provided to you by Cisco.
- **Opportunity Status –** Select the applicable Opportunity status or **Any** for all statuses.
- **Opportunity Close Date From/Opportunity Close Date To** – Specify the from/to 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.

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



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

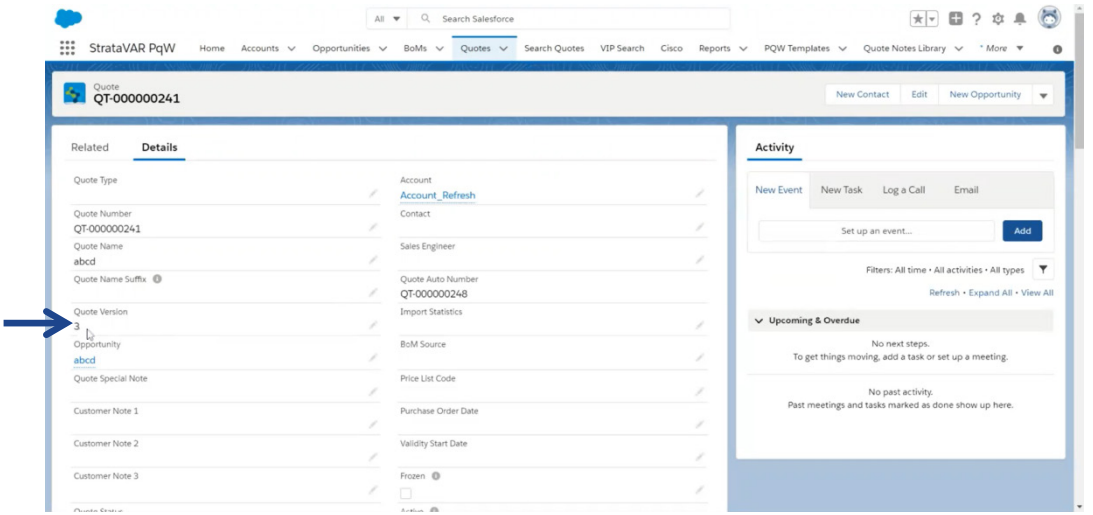
If needed, you can click a Quote in the list to change its VIP. To do so, simply click the Quote in the list, change the VIP in the **VIP Program** field and click **Apply**. An *Updating VIP* message displays while this change is in process, as shown below –



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 –

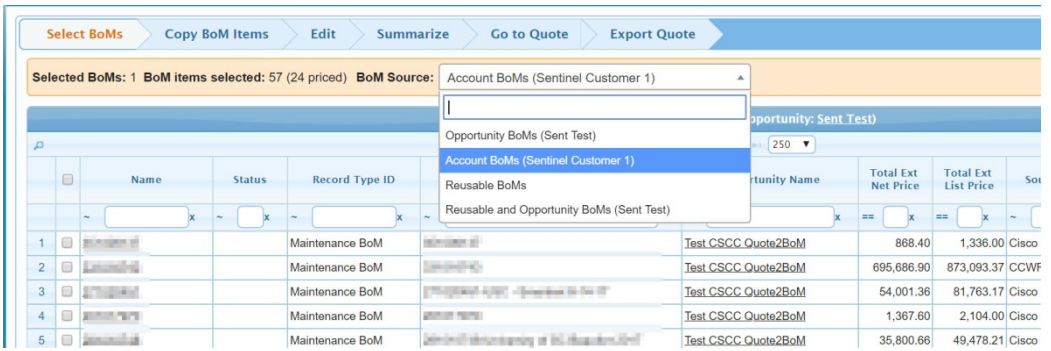


Save as New Quote Button

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



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.

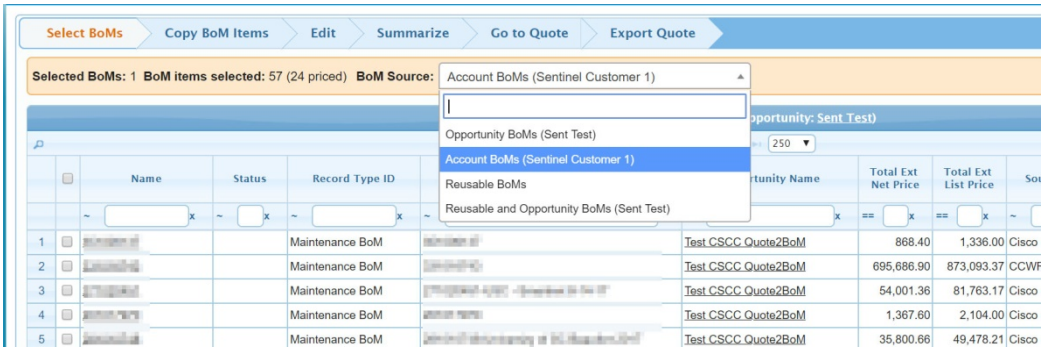
If the Quote will include items from multiple BoMs, it is up to you whether to –

- 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.

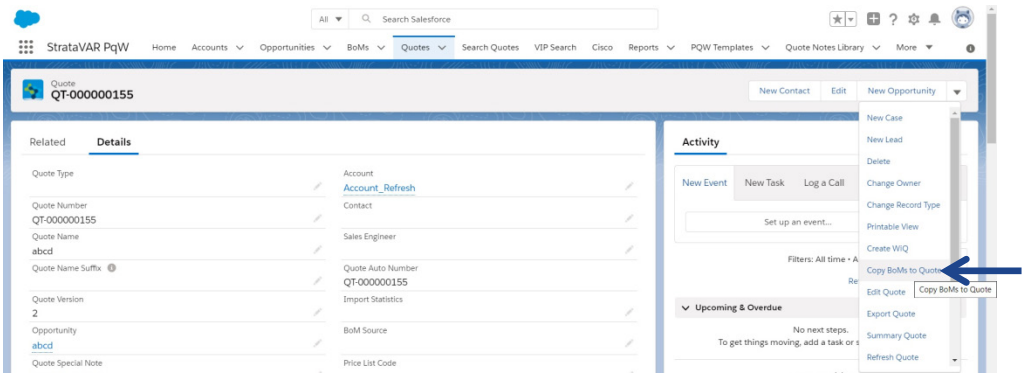
The following describes how to select a single BoM and then the items to be included in the Quote.

4.5.2 Listing the BoMs for Selection

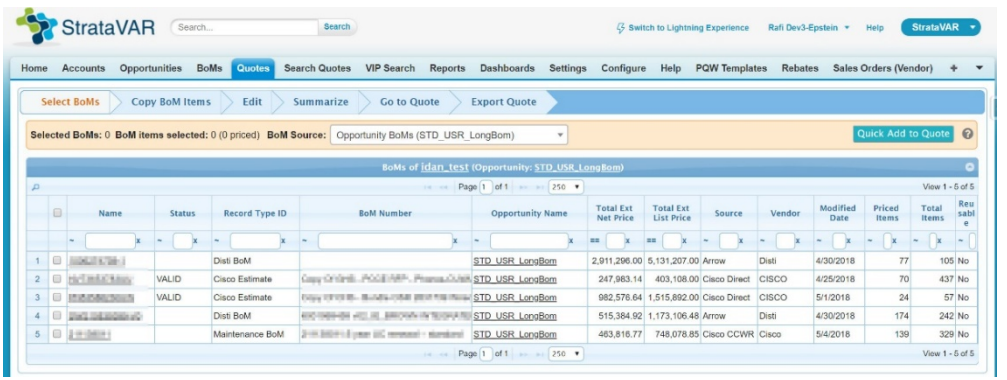
The following describes how to filter the list of BoMs to only show those that contain items that you would like to use for your Quote (which will be done in the next step on page 92).

▶ To list the BoMs for selection –

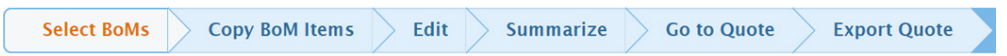
1 In the **Quote Details** page (shown on page 77), click the **Copy BoMs to Quote** button.



The following displays showing a list of BoMs –

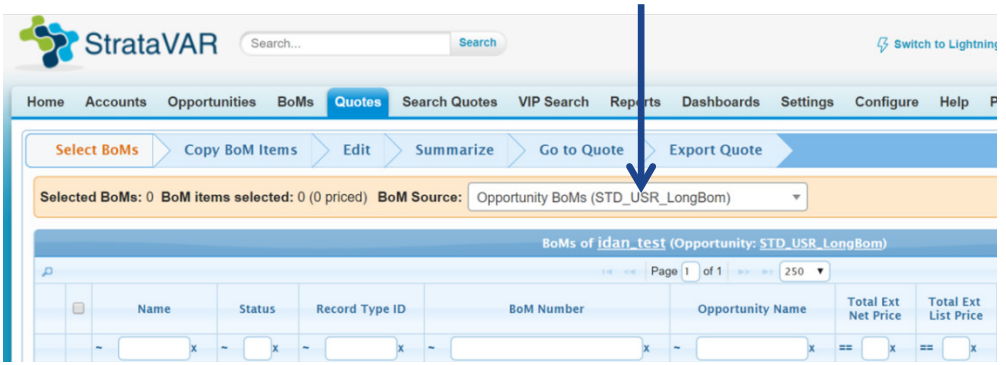


The top of this window lists the sequence of stages to be performed in order to generate a customer-facing Quote, as follows –

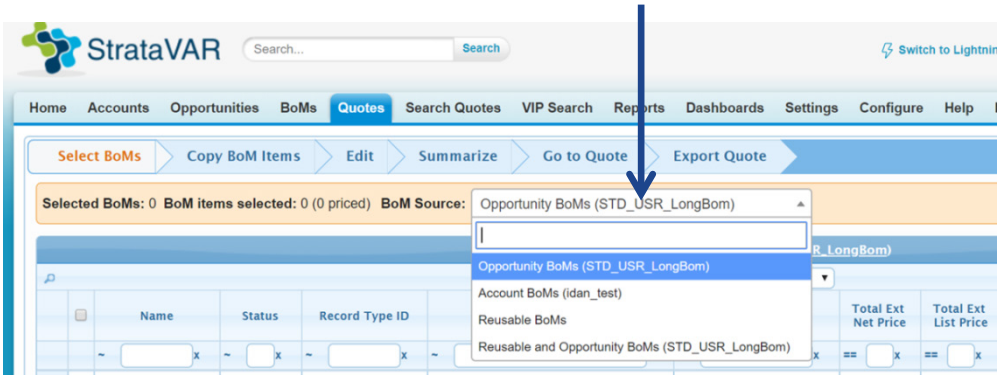


In general, these stages are to be performed from left to right; however, some are optional and you can repeat others. For example, if you already have a Quote open, you can go back and copy another BoM and its items to the Quote.

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

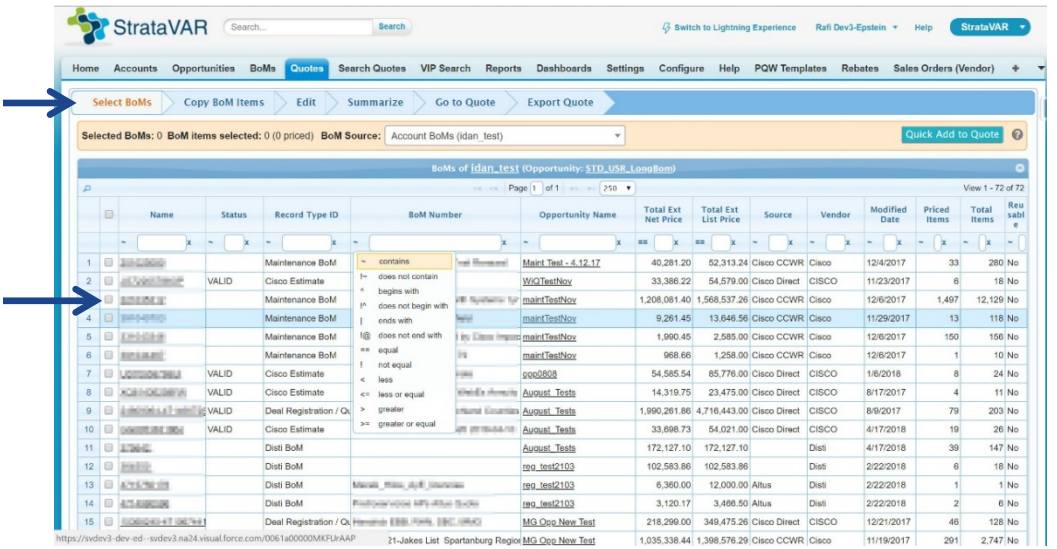
You can use the filter fields at the top of this window to narrow down the list of displayed BoMs.

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.



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

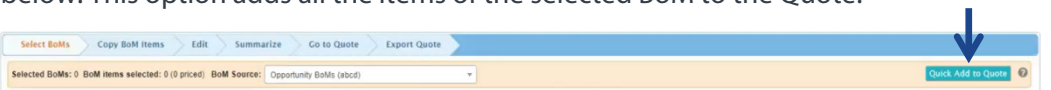
4.6 Selecting and Copying BoM Items into the Quote

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

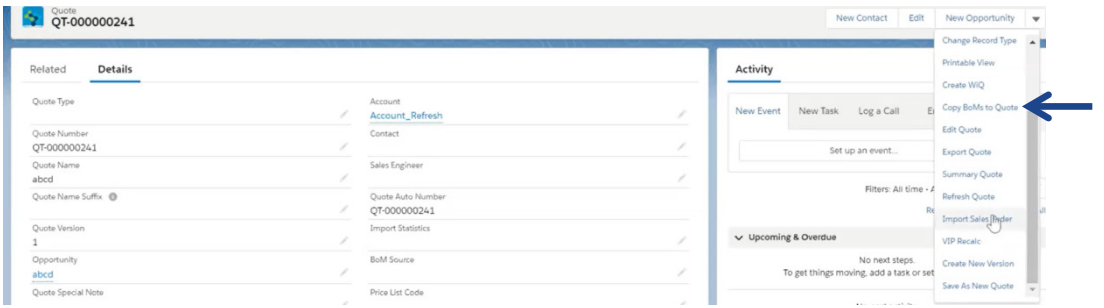
There are two ways to add the items of the selected BoMs to the Quote.

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.

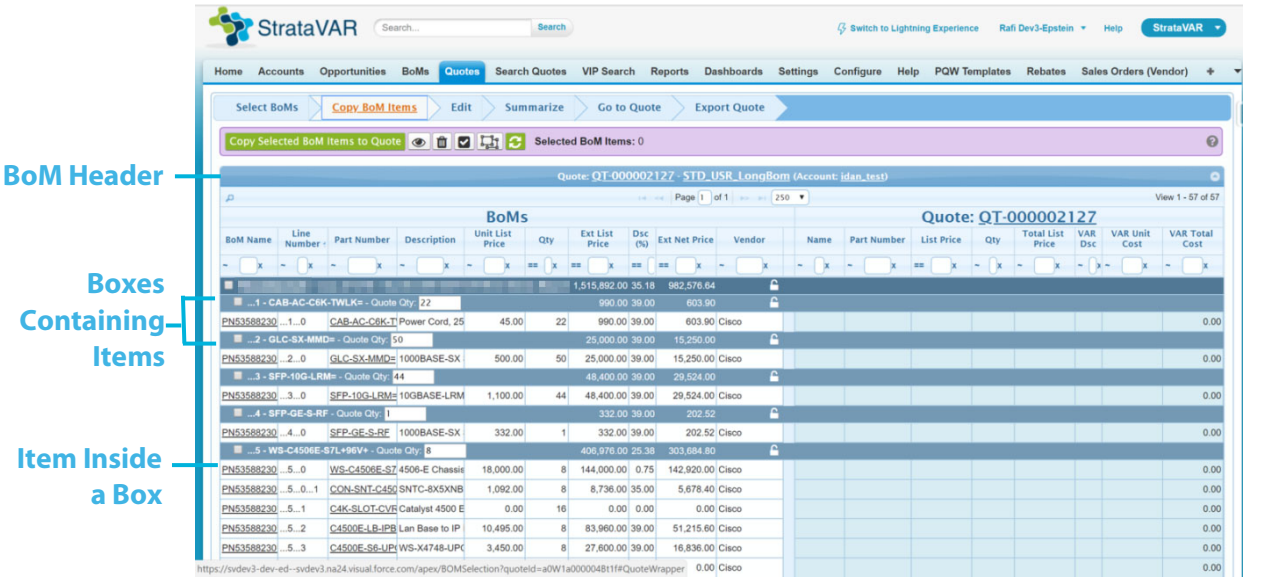


– OR –

Click the **Copy BoMs Items** button in the dropdown list, as shown below –



The following displays –



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

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

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

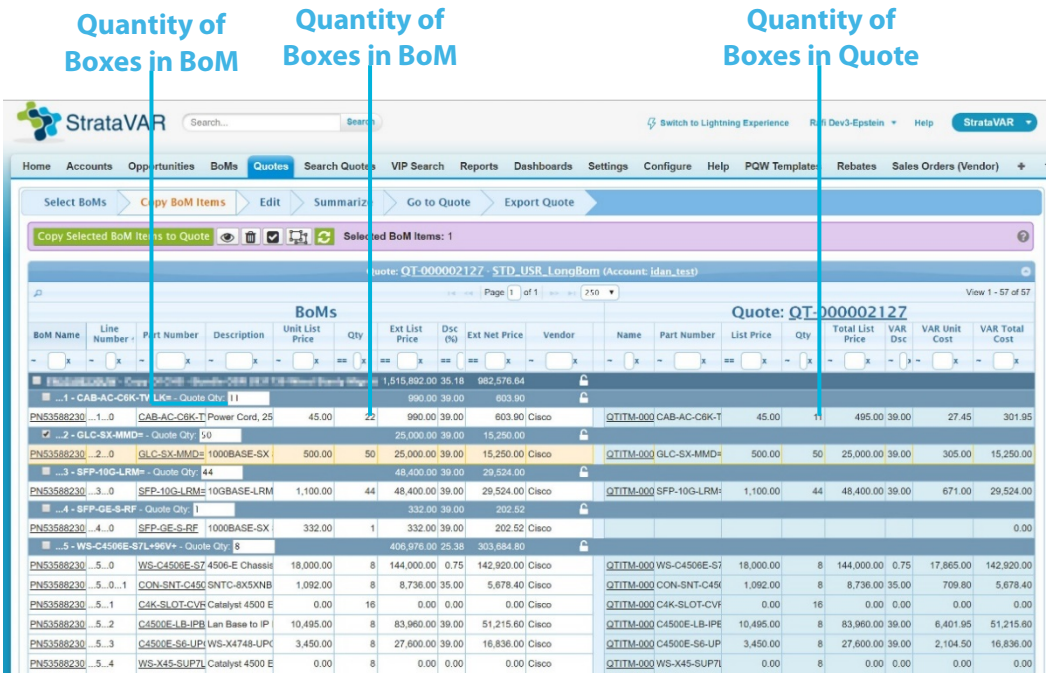
Rows in the BoMs list that have not been checked and have not been copied into the Quote remain empty in the Quote area (on right side of the window).

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

[redacted]						1,515,892.00	35.18	982,576.64									
...1 - CAB-AC-C6K-TWLK= - Quote Qty: 22						990.00	39.00	603.90									
PN53588230	...1...0	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	22	990.00	39.00	27.45	603.90
...2 - GLC-SX-MMD= - Quote Qty: 50						25,000.00	39.00	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
...3 - SFP-10G-LRM= - Quote Qty: 44						48,400.00	39.00	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
...4 - SFP-GE-S-RF - Quote Qty: 1						332.00	39.00	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
...5 - WS-C4506E-S7L+96V+ - Quote Qty: 8						406,976.00	25.38	303,684.80									
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-C45	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	Lan Base to IP	10,495.00	8	83,960.00	39.00	51,215.60	Cisco	QTITM-000	C4500E-LB-IPE	10,495.00	8	83,960.00	39.00	6,401.95	51,215.60
PN53588230	...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
PN53588230	...5...4	WS-X45-SUP7L	Catalyst 4500 E	0.00	8	0.00	0.00	0.00	Cisco	QTITM-000	WS-X45-SUP7	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.



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.

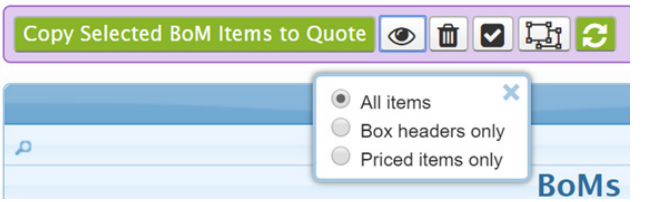
Check the checkboxes of the boxes and items to be added to the Quote.

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).



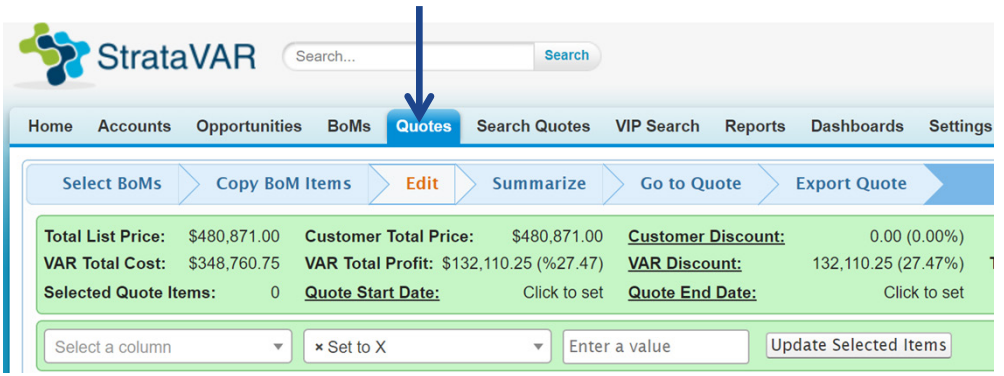
- **Delete Selected Quote Items –** To remove BoMs, boxes or items from the Quote (which appeared on the right side of the window), select the relevant items in the left side of the window, and then click the **Trash** button. The BoM itself is not affected, but these items will be removed from the Quote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

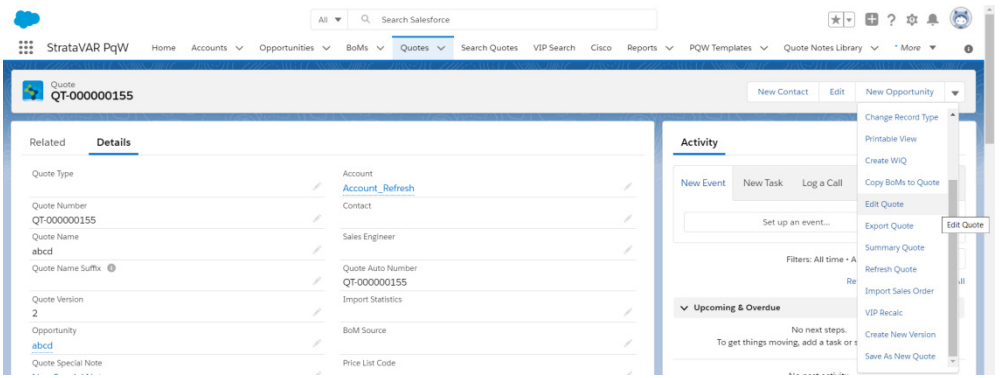
There are two ways to edit a Quote after it has been created and saved –

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

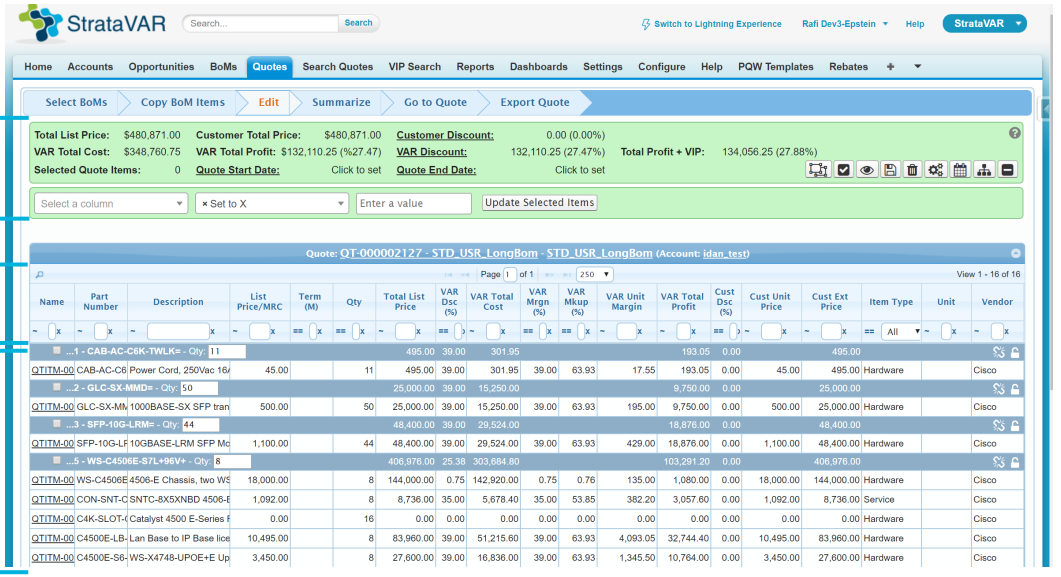


– OR –

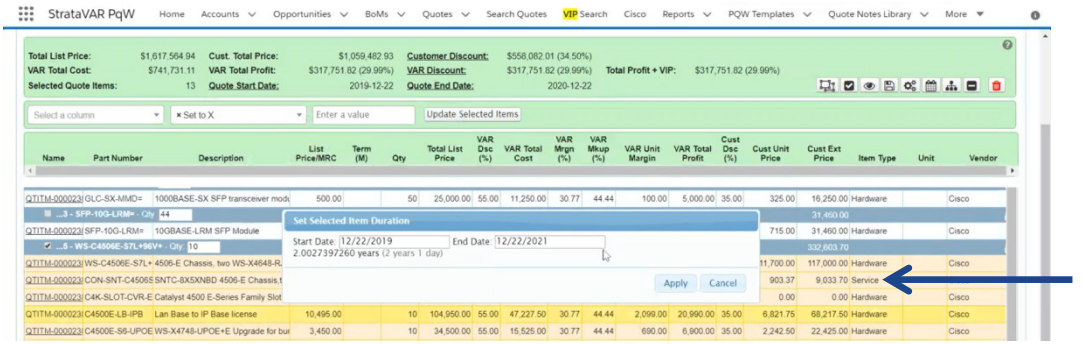
- Select the **Quotes** tab to see a list of Quotes and then click one of the listed Quotes to display the **Quote Detail** page. For example, as shown below –



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



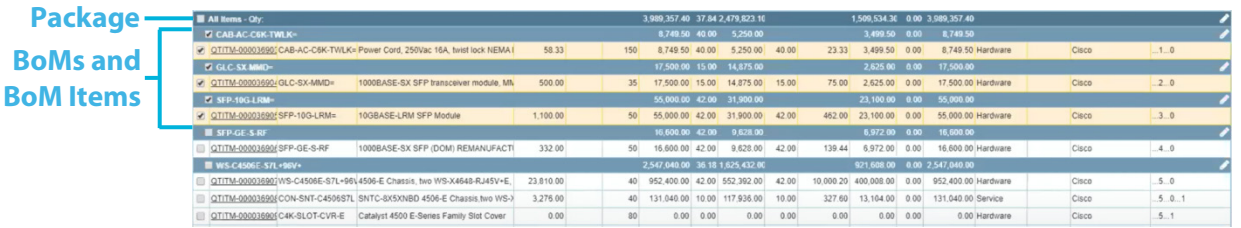
In this window, the **Quote Start Date** and **Quote End Date** relate to services. If you change the **Set Items Duration**, as shown below, note that the prices for all **Service Item Types** change accordingly, based on the defined duration.



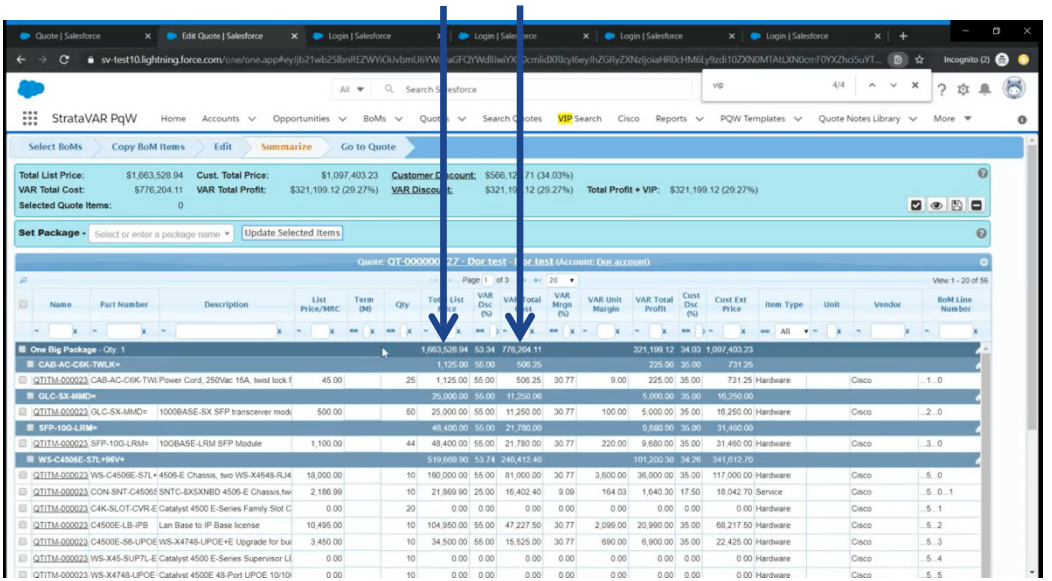
4.10 Summary Quotes

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.

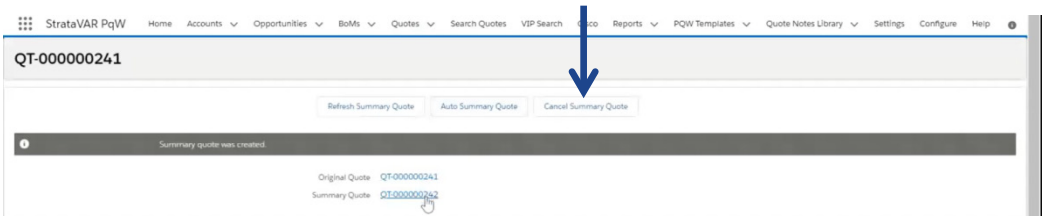


Each blue (package) row shows the **Total List Price** and **Total VAR Cost** for that package.



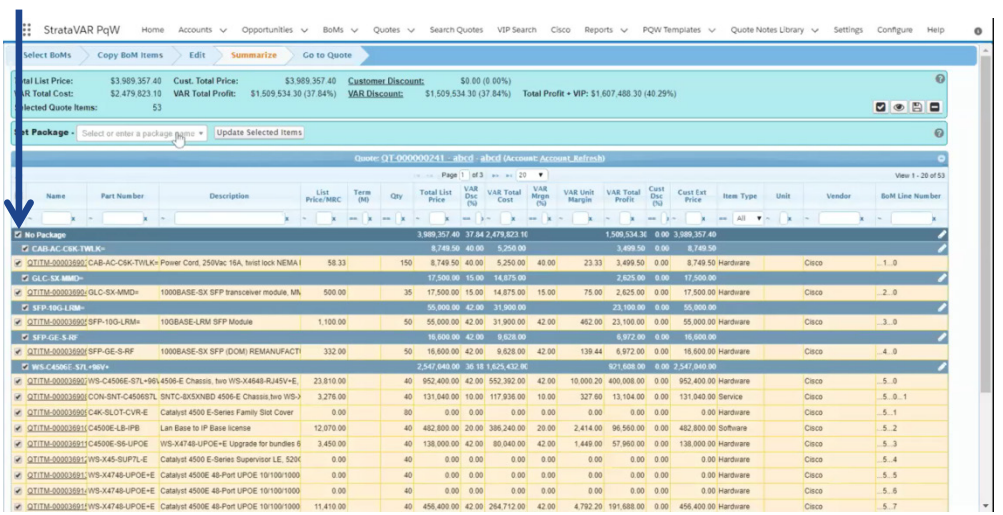
A BoM item can only belong to one package.

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 –

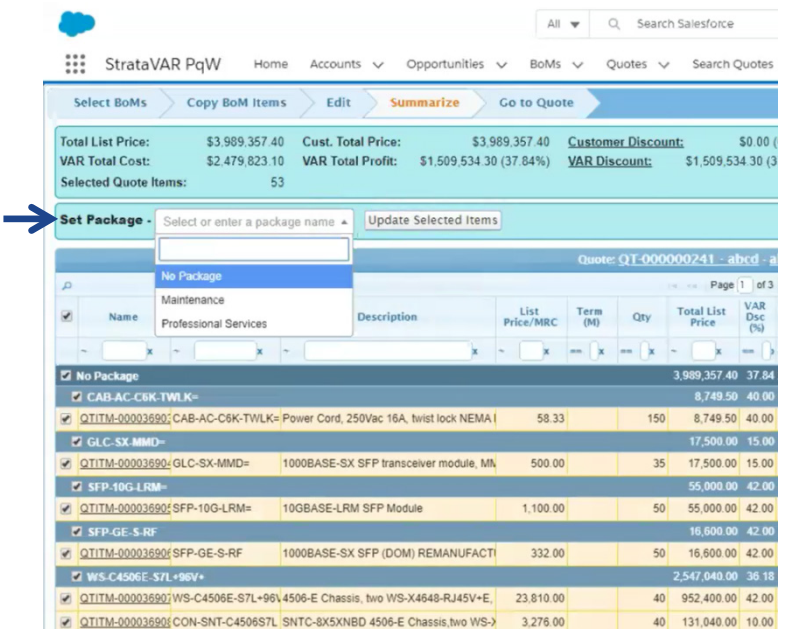


► To create a package for a summary Quote –

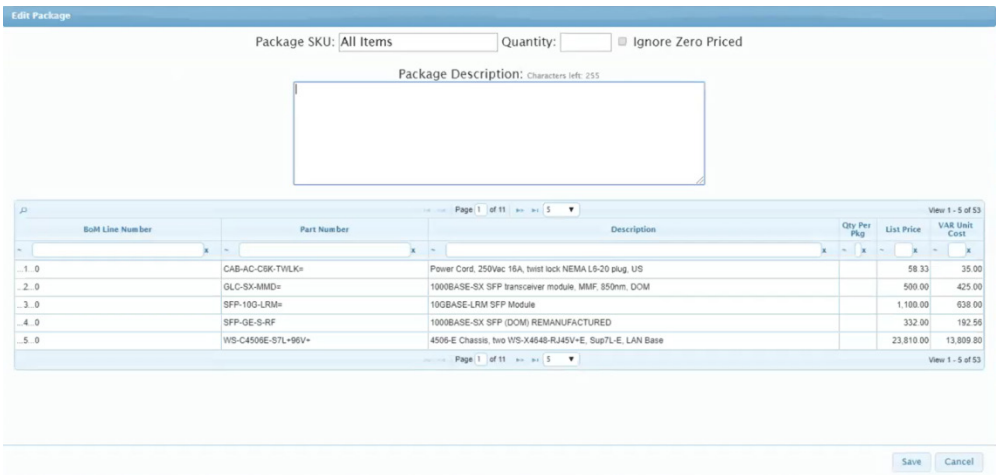
1. Select the Quotes **Summarize** tab.
2. Select the BoMs and/or BoM items for the Quote by selecting the checkbox of the row(s) to be included in the Quote summary.



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



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



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.

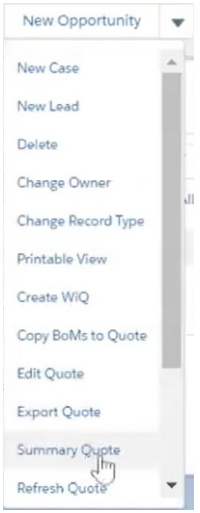
4.10.1 Automatic Summary Quotes

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.

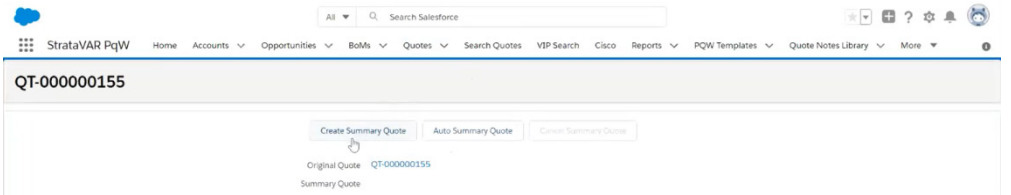
Alternatively, you can manually create a summary Quote, as described on page 105.

► To automatically create a summary Quote –

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

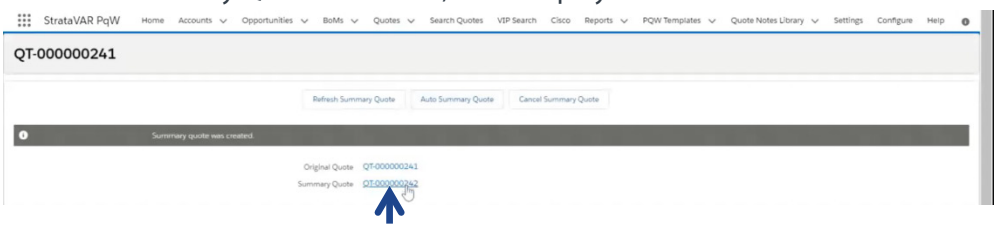


The following displays –

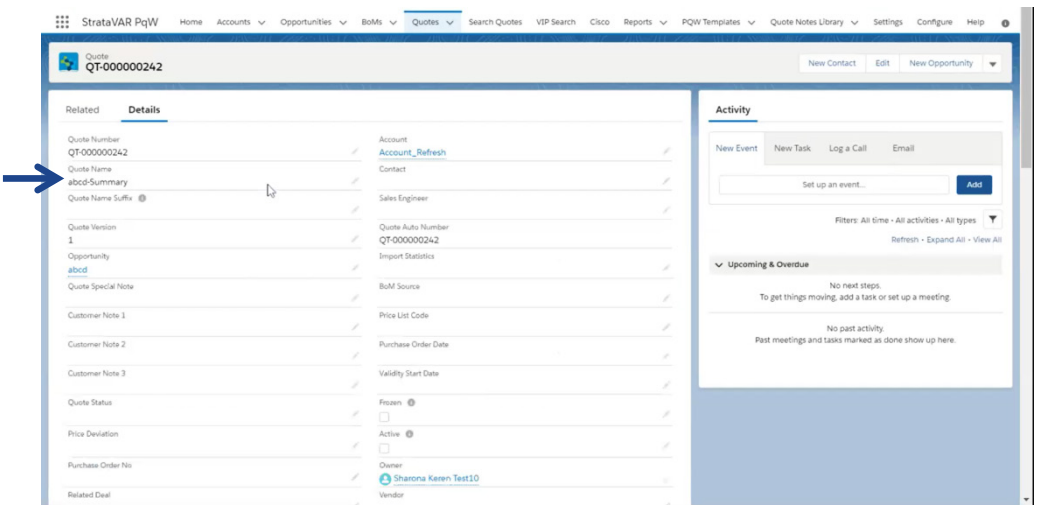


2 Click the **Auto Summary Quote** button. Selecting this option automatically creates a summary Quote, based on the packages that exist in the **Summarize** tab (see page 102).

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

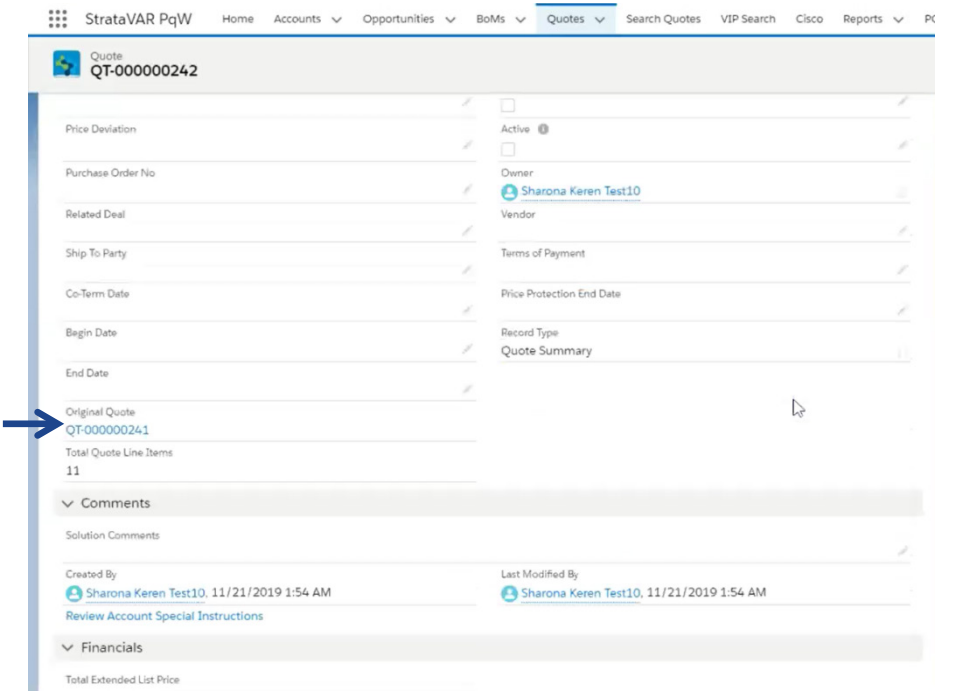


3 Click the summary Quote ID to view the details for the summary Quote.



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 –



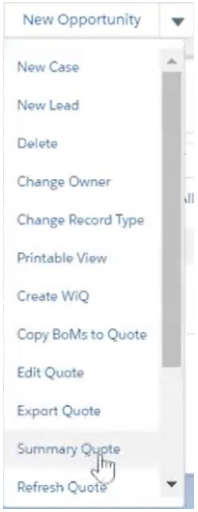
4.10.2 Manual Summary Quote

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

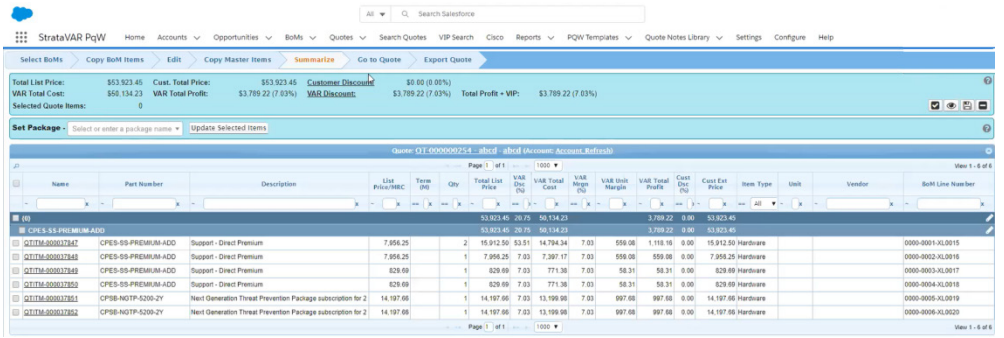
Before defining a manual summary Quote, you should first define the package(s) for the Quote, as described on page 101.

► To manually define a summary Quote –

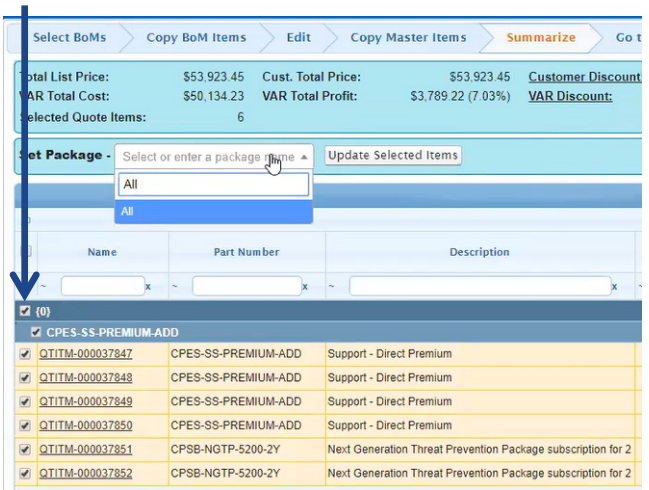
1 Select **Edit Quote** in the dropdown menu.



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

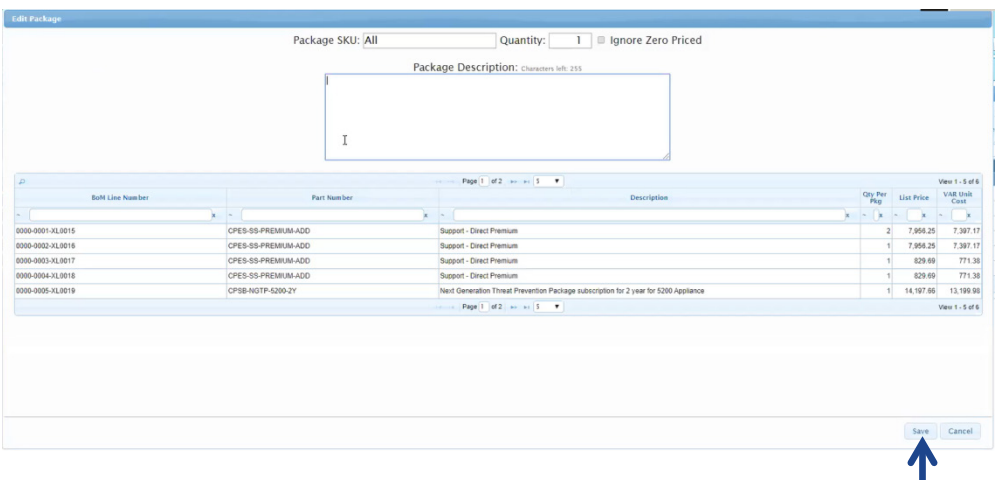


3 Select the checkbox of each Quote to be included in the summary Quote. For example, all Quotes were selected in the window below.



4 In the **Set Package** field, enter a package name. Then, click that package in the list of packages to confirm its selection.

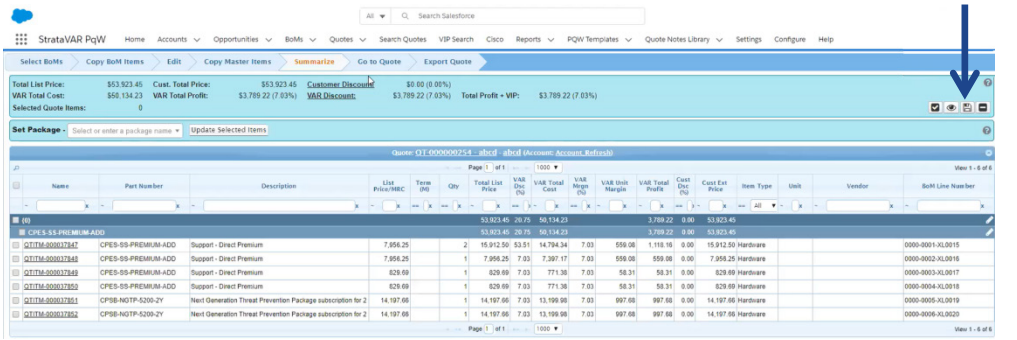
5 Click the **Update Selected Items** button. The Edit Package window displays, which shows all the items included in the package. Each row in the table represents a different item.



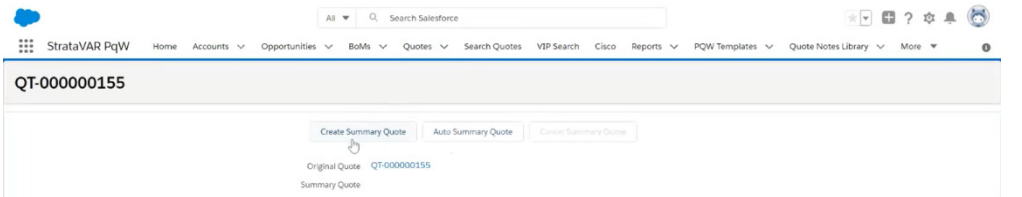
6 In the **Package Description** field, enter a description of the package.

7 Click the **Save** button in the Edit Package window.

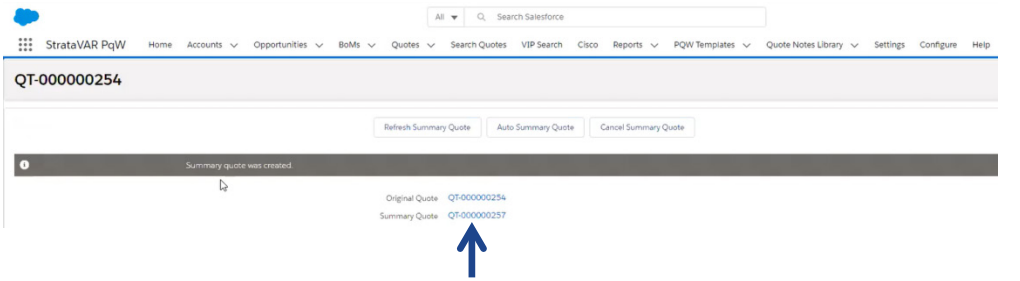
8 In the **Summarize** tab, click the **Save** button.



The following displays –



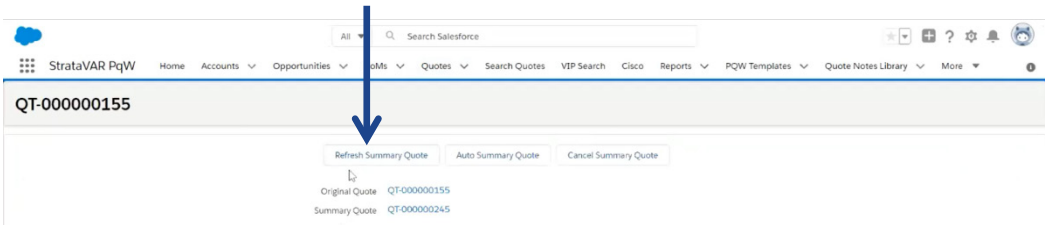
9 Click the **Create Summary Quote** button. Once the summary Quote is created, its ID displays in the window.



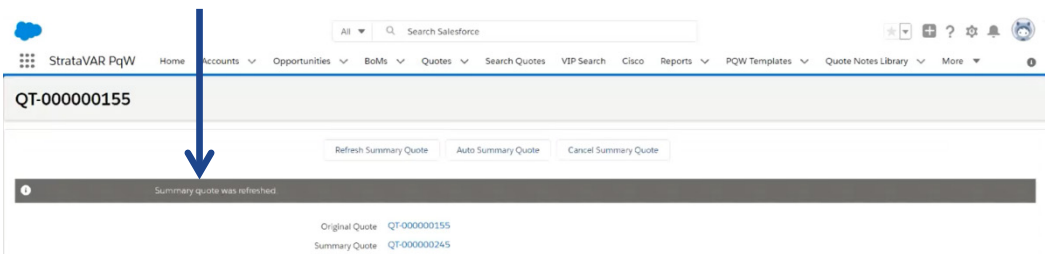
4.10.3 Refreshing a Summary Quote

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 –



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

5

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

1. Filtering the Items That Are Displayed Page 112
2. Defining the Pricing Operation and Value Page 114
3. Adjusting the Pricing of Specific Items Page 117

5.3 Filtering the Quote Items That Are Displayed

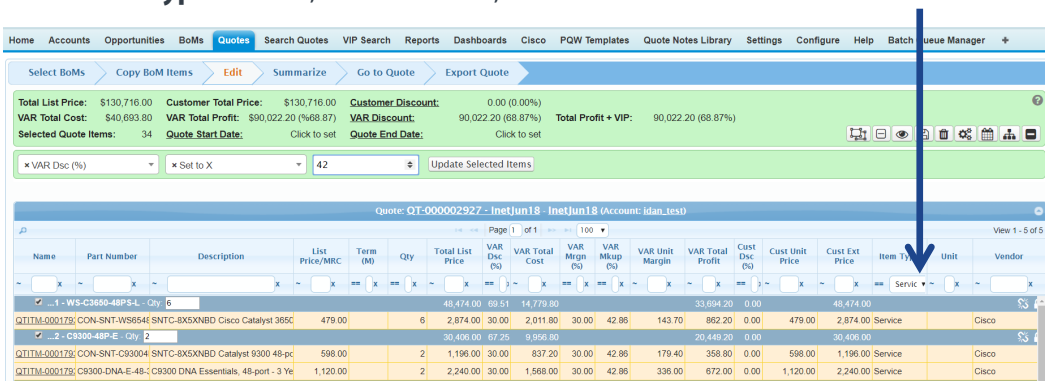
The **Pricing Operations** area of the Quote Editing window (shown below) provides a variety of column headers that enable you to adjust the values of all the displayed items at the same time. Only those columns in the **Search a column** box are editable.

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.

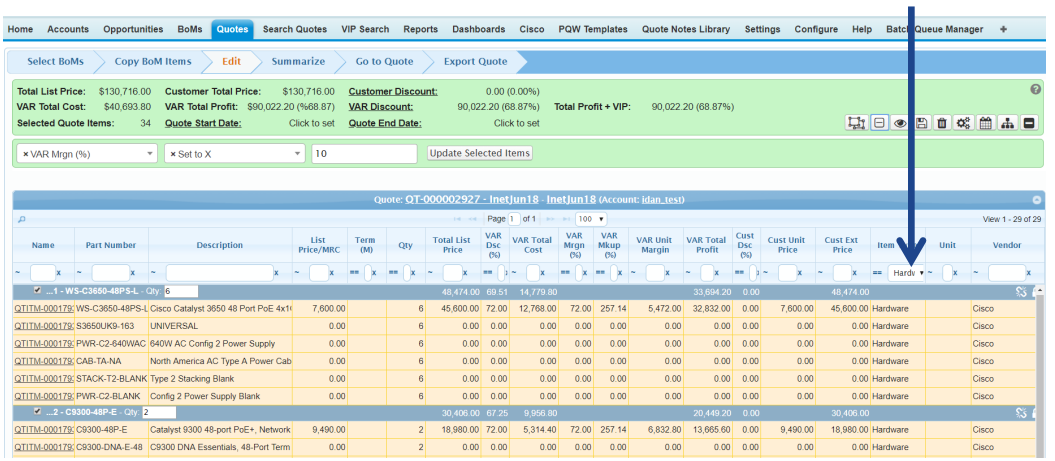
Example 2

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



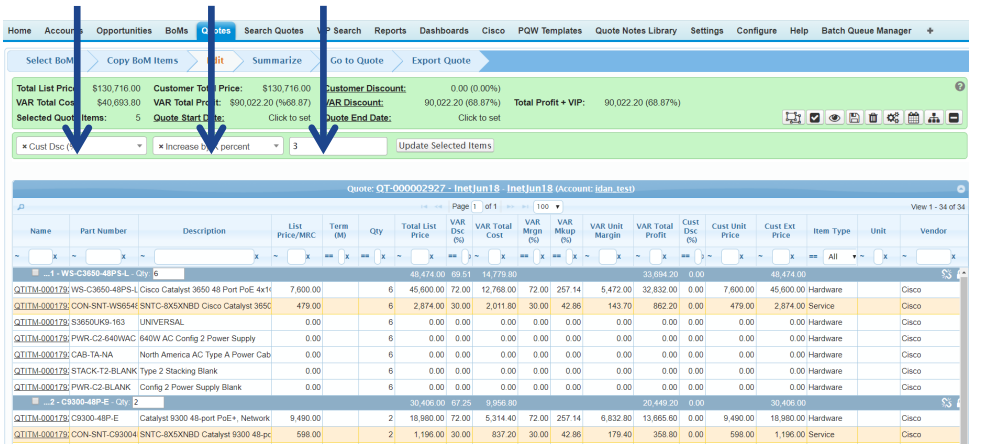
Example 3

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%.



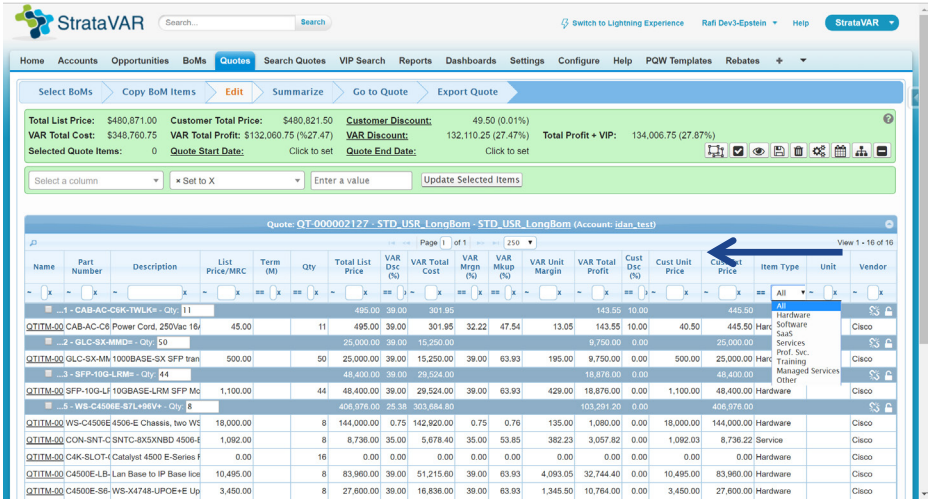
Example 4

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



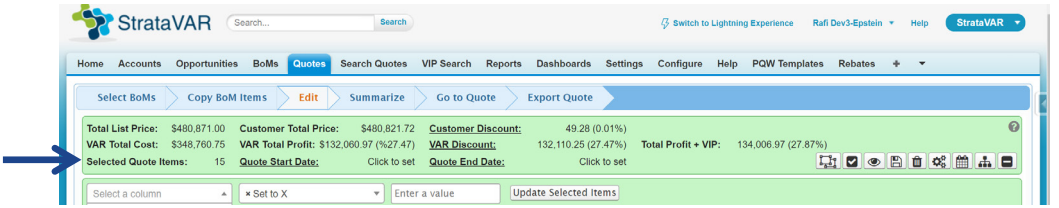
The procedure of adjusting the cost/price of the entire Quote may be an iterative process in which you may change the values multiple times, optionally using different filters, until you get the Quote just right. In general, this process is primarily comprised of the following stages –

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



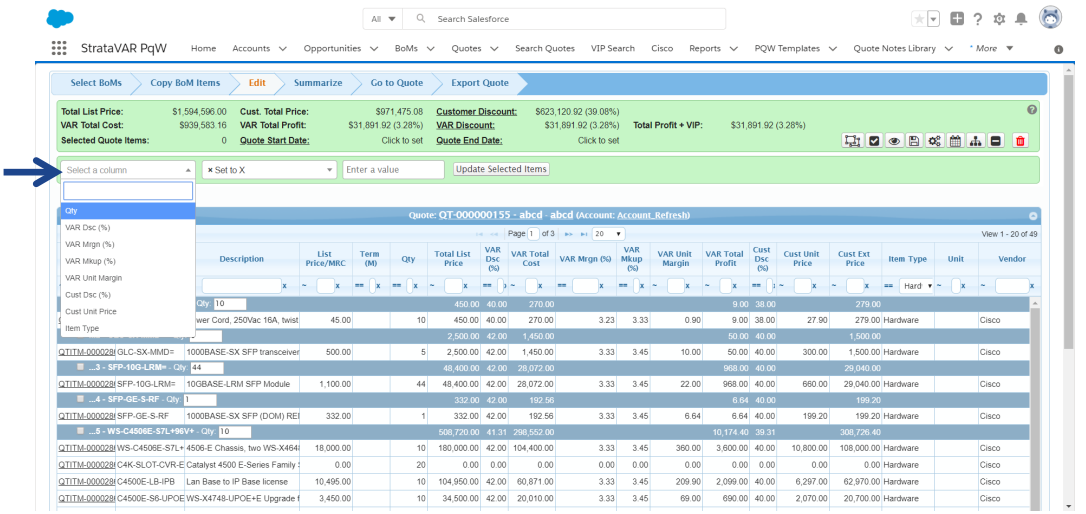
Click the **Select All** button to select all the displayed items, meaning all the **Hardware** items or check the checkbox(es) of the item(s) you want to select.

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

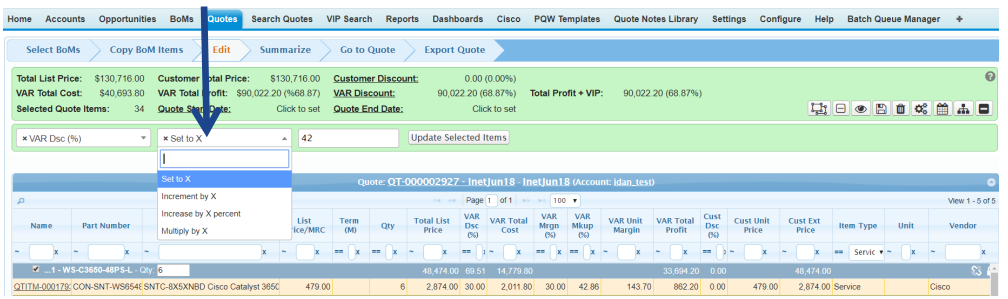
The following area is provided in order to enable you to define the pricing operation applied to a specific column of the displayed rows –



► 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.

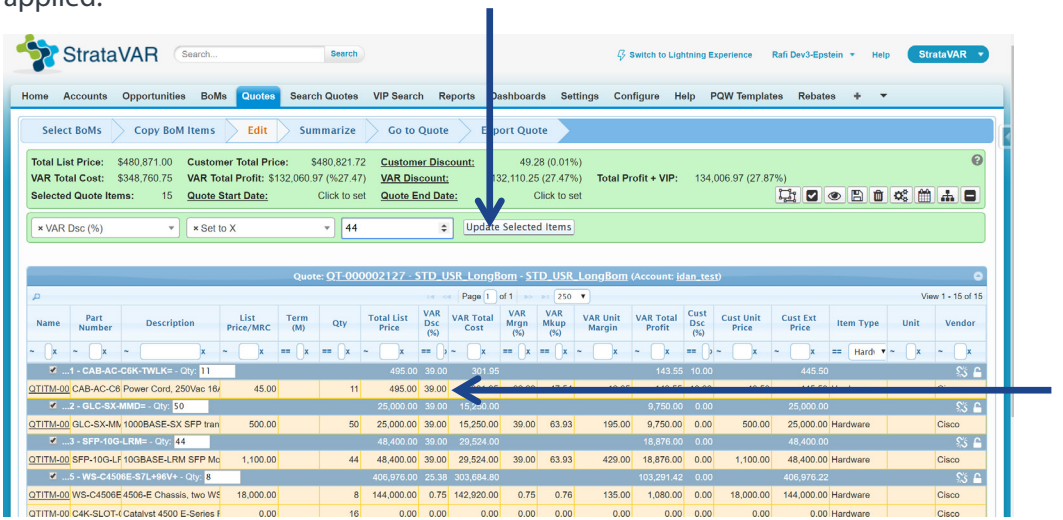
2. In the field to its right, select one of the operations to perform on the values of that column for all the displayed rows. For example, **Set to X**, as shown below. The value of **X** is defined in the adjacent field to the right, as described below.



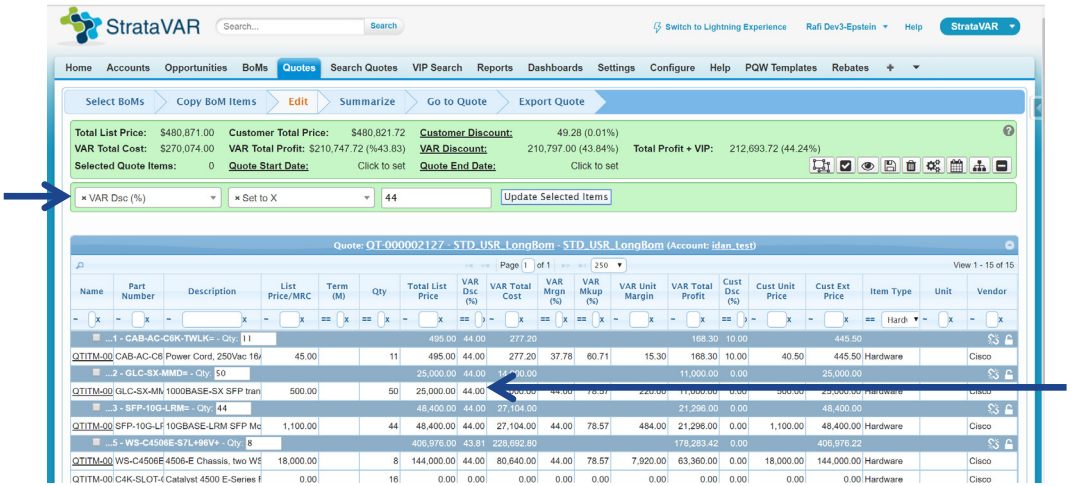
- **Increment by X –** Adds the value from the column. For example if one line has 40% VAR Discount and the next has 50%, **Increment by X** with the value of 2 sets the numbers to 42 and 52, respectively. Similarly, if the value is -2, the values are set to 38 and 48, respectively. Note that negative 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% an 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 following window shows a Quote before the pricing operation above was applied.



4 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 –

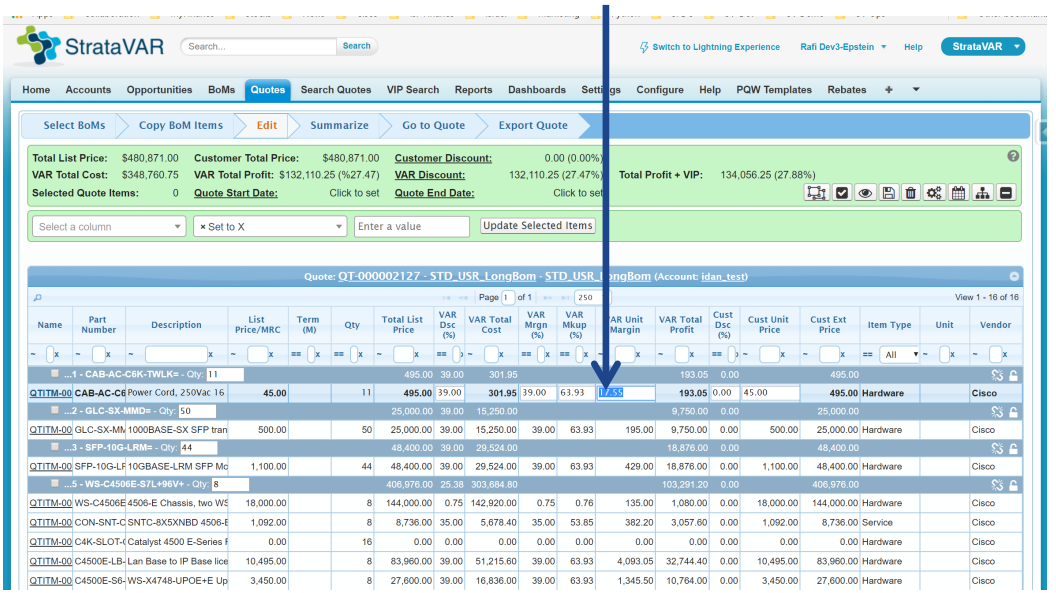


As you can see, the value in the **VAR Dsc (%)** has been changed from **39** to **44** in all the selected items.

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 –



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

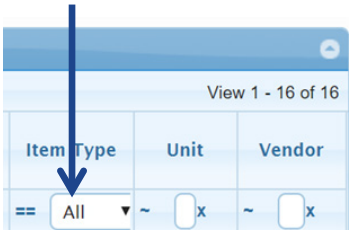
To edit the field of another item, simply click it in the same way as above.

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**.



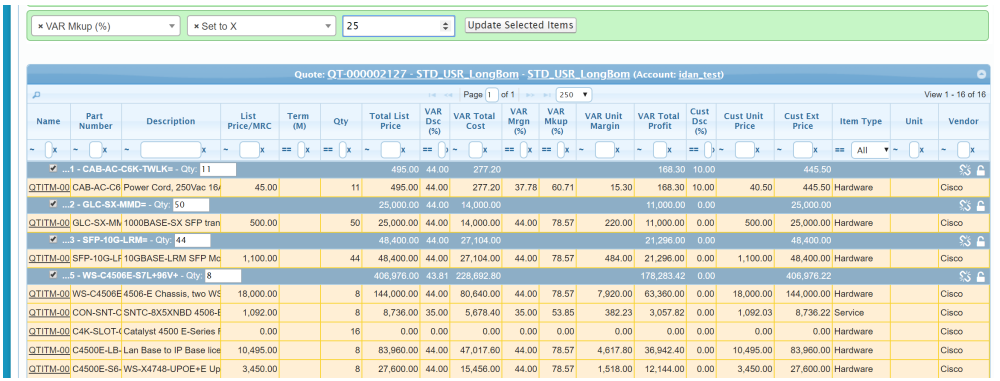
2. Click the **Select All** button.

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 (%)**.

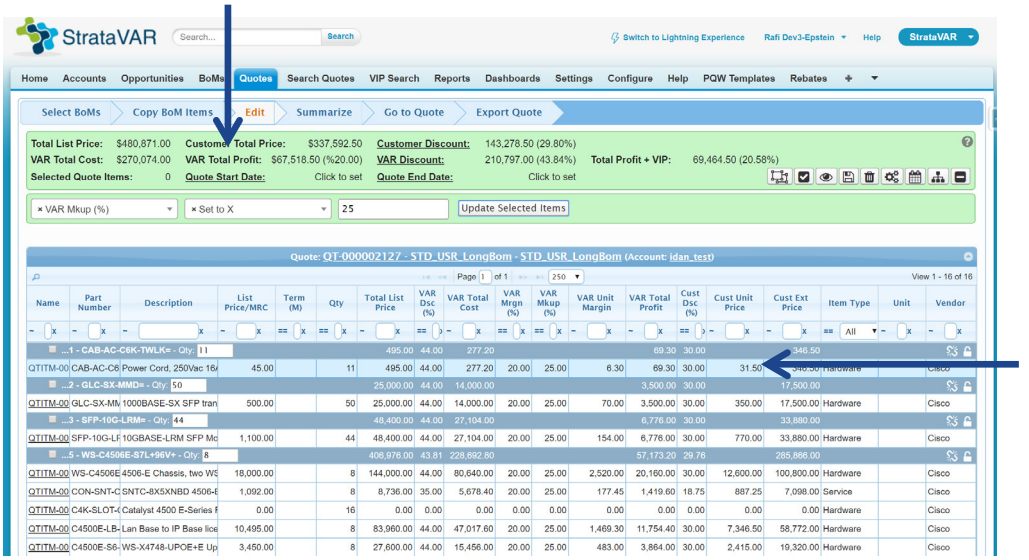
4. In the field to its right, select one of the operations to perform on the values of that column for all the displayed rows. For example, **Set to X**.

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

   For example, as shown below –



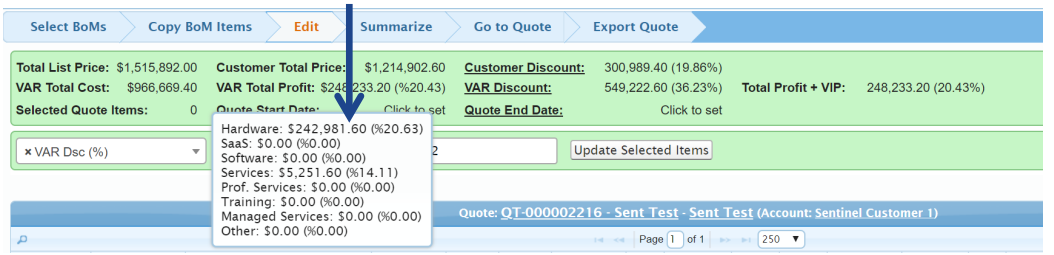
6 Click the **Update Selected Items** button to apply this pricing operation to all the items.



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 –



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.

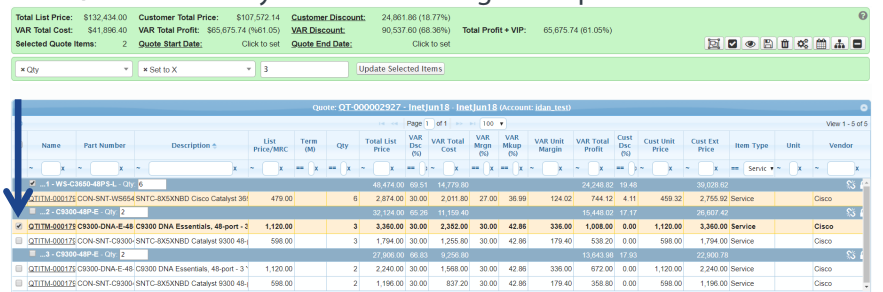
Total ProfiT + VIP

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

Buttons

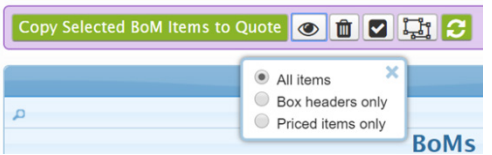
The green aggregation and summary area contains the following buttons –

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



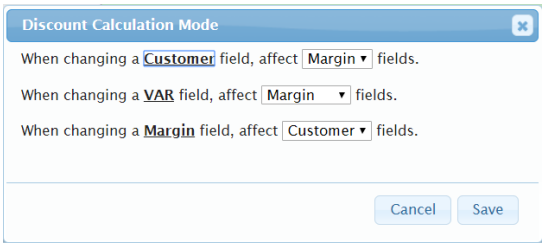
Select All/Deselect All – Toggles to select/deselect all items in the Quote.

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

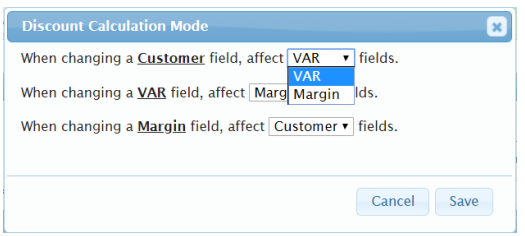


Save – Saves the Quote.

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



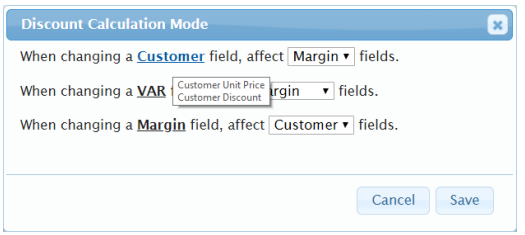
PQW is set up so that editing specific fields in the Quote window, affects other types. For example, changing a **Customer** field can affect the **VAR** or the **Margin** fields in the Quote.



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.

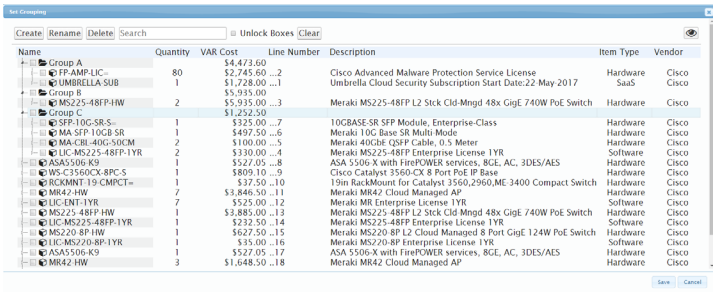
Conversely, if you select **Margin** in the **Customer** field, it means that you increase the customer's unit price, which in turn affects the profit margin fields, but not the VAR fields, thus giving you more profit.

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 –



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 –



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.

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

6

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.

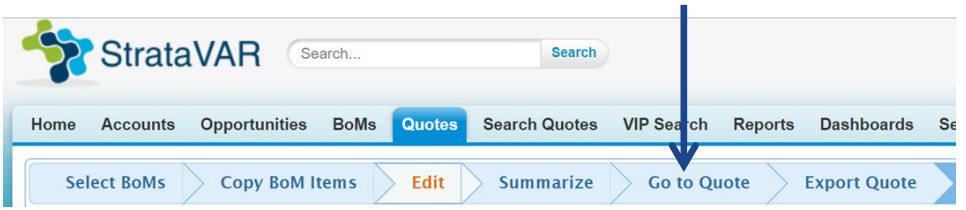
Note – People with expertise in Force.com programming and who have some StrataVAR PQW training can create additional quote templates, in addition to those provided by StrataVAR PQW.

6.2 Generating a Quote – How To

▶ To generate a customer-facing Quote –

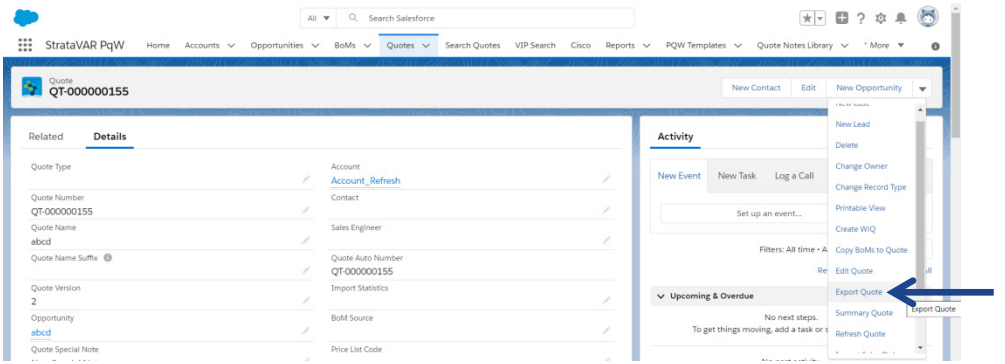
1 Start generating a customer-facing Quote using one of the following options –

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

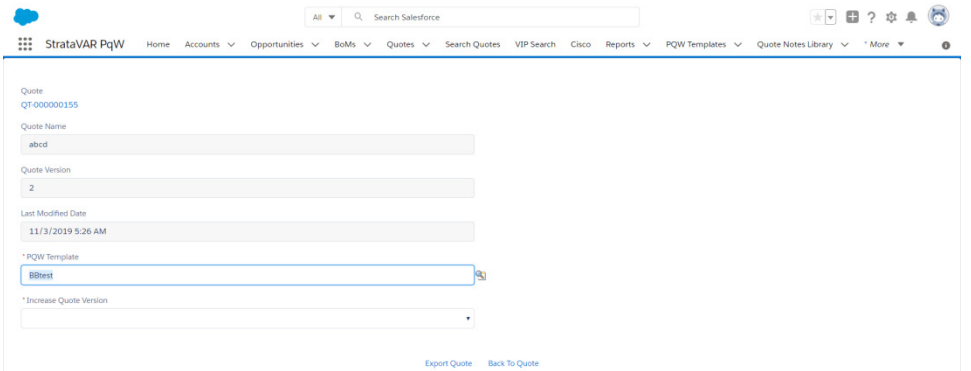


– OR –

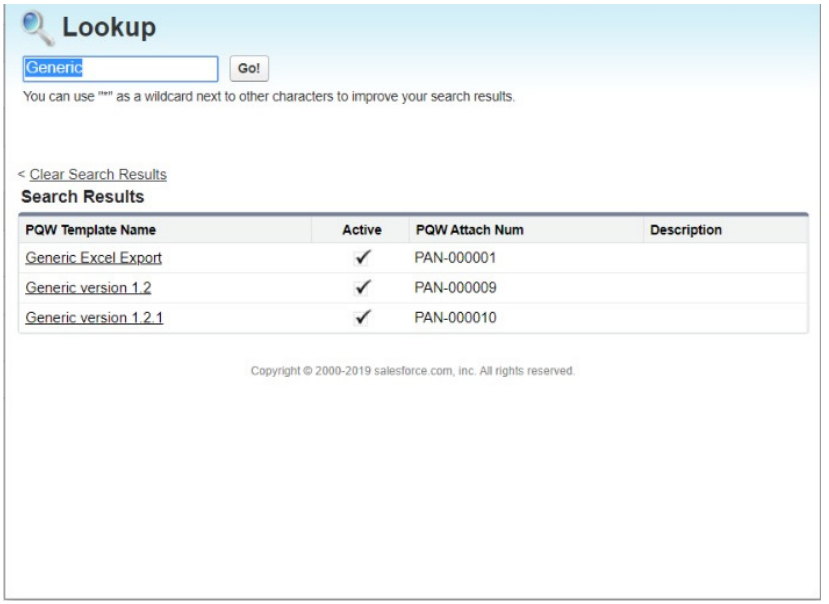
- Select the **Quotes** tab and then click the **Export Quote** button, shown below –



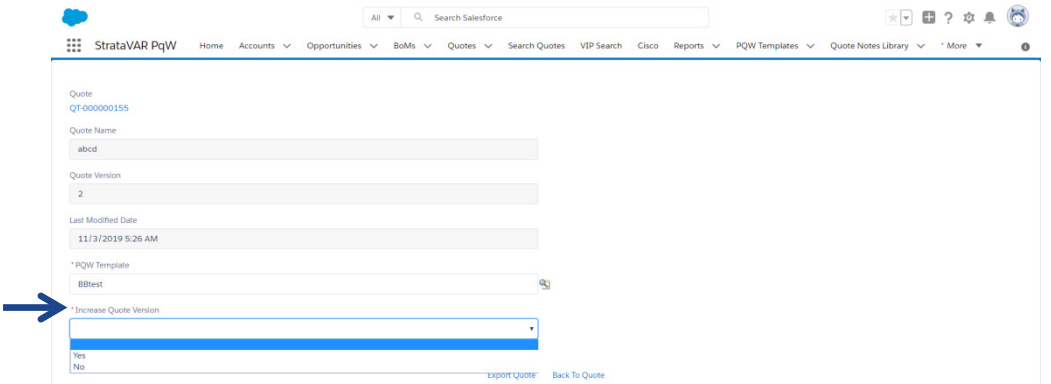
In both cases, the following displays –



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.

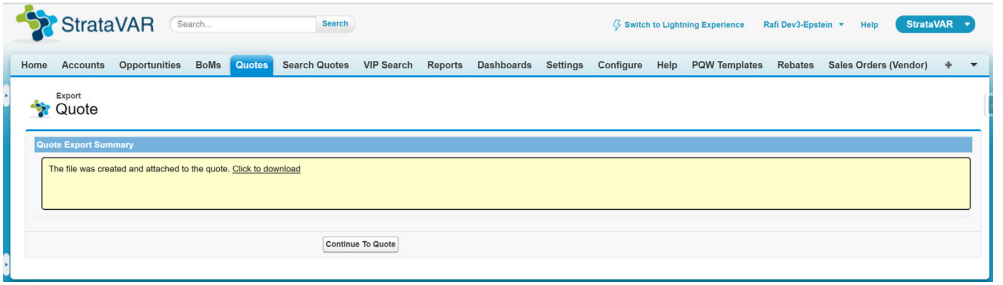


3 In the **Increase Quote Version** field, select **Yes** or **No** in order to specify whether the **Quote Version** field in the **Quote Detail** page (shown below) is automatically incremented.

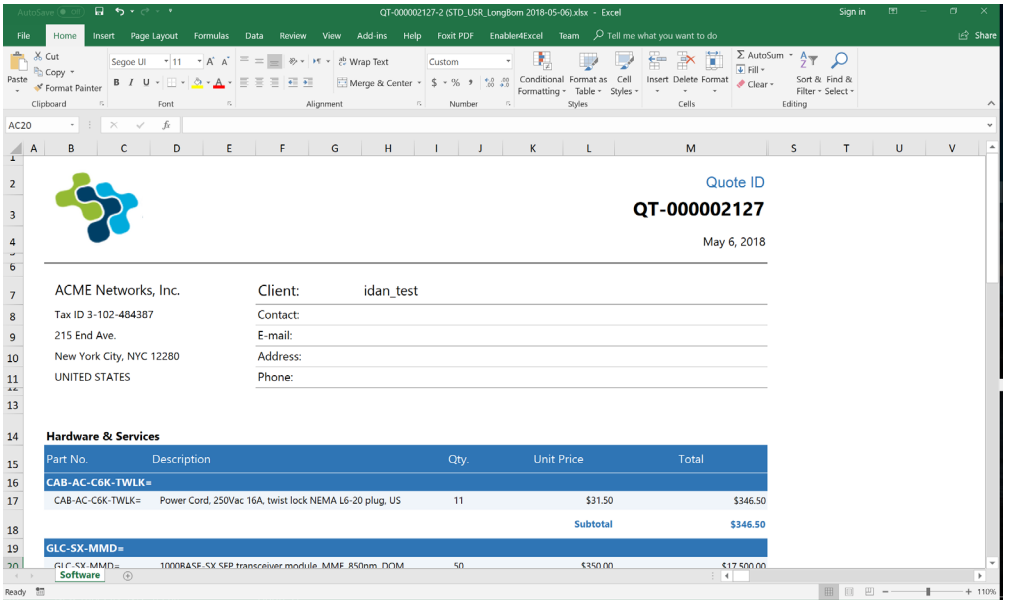


Note – Remember that the information that is included/excluded to/from the external customer-facing Quote (including this version number) is determined by the quote template that you selected, as described in page 125.

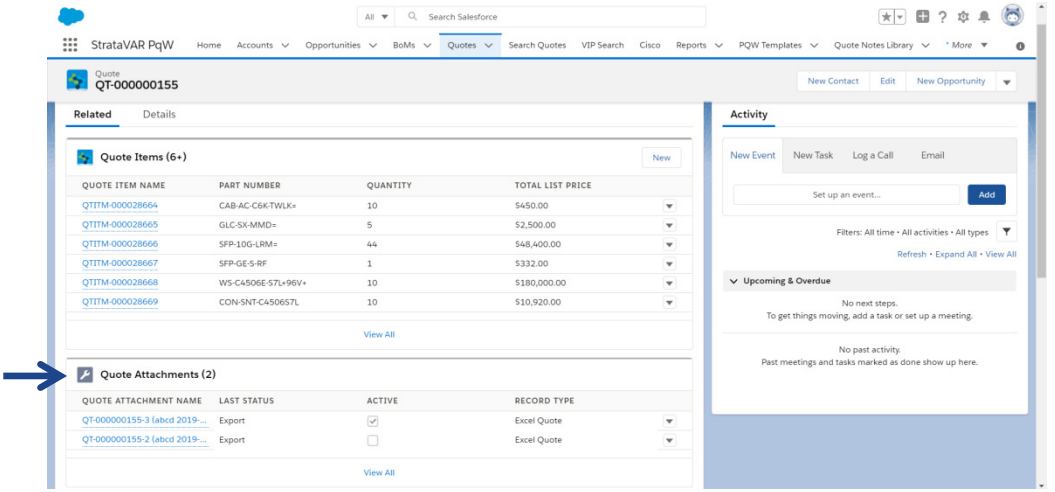
4 Click the **Export Quote** button. When the Quote is ready, the following is displayed –



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 –



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



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

7

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 **Refresh BoM** does not remove the manually added item after the refresh.	The manually added item is reflected in the Quote after the **BoM Refresh** 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.

Index

A

Account, 12, 75
  Creating, 23
Adjusting the Pricing of Specific Items, 117
Applying
  Operators to Table Filter, 31
Assembly, 10, 69
Attach Disti Button, 53

B

Basic Concepts, 8
BoM, 9
  Detail Buttons, 52
  Details Tab, 50
  Editing, 40
  Filtering, 92
  Importing, 40
  Listing for Quote, 90
  Maintenance, 59
  Resuable, 59
  Reusable, 42
  Selecting for Quote, 88, 92
  Status, 50
  Type, 44
BoM Item
  Copying into Quote, 97
  Selecting for Quote, 93
  Specifying Quantity for Quote, 96
BoM Type
  Cisco Estimate, 45
  Deal Registration, 45
  Disti, 46
  Maintenance, 48

C

CCW-R Invoice, 66
Cisco Estimate, 45
Classic Mode, 21
Clearing
  Table Filter, 31
Concepts, 8
  Salesforce, 10
Contact, 75
Copy BoMs Button, 54
Copy BoMs to Quote Button, 80
Copyright, 6
Cost, 9
Create New Quote Button, 53
Create New Version Button, 86
Creating
  Account, 23
  Opportunity, 24
  Project, 24

D

Deal Registration, 45
Defining
  Maintenance BoM, 60
  Pricing, 114
  Quote, 72
  Value, 114
Disti, 54
Disti BoM, 46
Disti Quote Merge, 54

E

Edit Existing Quote Button, 54
Edit Quote Button, 80
Editing
  BoM, 40
  Quote, 98
Export Excel, 58
Export Quote Button, 80

F

Filtering, 30
  BoMs, 92
  Quote Items Displayed, 112

G

Generating a Quote, 125, 126
Glossary, 6

H

How To, 16

I

Import BoM Button, 42
Import Button, 49
Import Format, 54
Import Sales Order Button, 80
Importing, 39
  BoMs, 40
  Import BoM Button, 42
  Sources, 39

L

Launching
  StrataVAR PQW, 19
Lightning Mode, 21

M

Maintenance BoM, 48, 59
  Defining, 60
  Quote Aggregation, 61
Markup Example, 118

N

Notes Library, 78

O

Object Relationships, 31
Open BoM CCW Button, 52
Open Existing Quote Button, 53
Opportunity, 11, 74
  Creating, 24

P

Package
  Creating, 101
Price, 10
Pricing
  Adjusting, 117
  Defining, 114
  Filtering Quote Items, 112
  Markup Example, 118
  Quote, 111
Project, 11
  Creating, 24

Q

Quote
  Account, 75
  Aggregation for Maintenance BoM, 61
  Assembling, 69
  Assembly Workflow, 70
  Contact, 75
  Copying Items, 97

Customer Note, 74
Customer-facing, 9
Defining, 72
Disti, 54
Editing, 98
End-customer, 9
Generating, 125, 126
Listing BoMs, 90
Notes Library, 78
Opportunity, 74
PQW, 9
Pricing, 111
Pricing Workflow, 111
Quote Container, 70
Quote Name, 73
Quote Name Suffix, 74
Quote Number, 73
Quote Version, 74
Related Deal, 75
Sales Engineer, 76
Selecting BoM Items, 93
Selecting BoMs, 88, 92
Ship to Party, 75
Source, 8
Special Note, 74
Specifying BoM Box/Item Quantity, 96
Status, 75
Summary, 100
Supplier, 8
Quote Container, 70
Quote Customer Note, 74
Quote Name, 73
Quote Name Suffix, 74
Quote Number, 73
Quote Special Note, 74
Quote Version, 74

R

Refresh BoM Button, 53
Refresh Options, 131
Changes in BoM, 133
Changes in CCW, 132
Changes in Quote, 134
Importing CCW-R into Another Quote, 135
Refresh Quote Button, 80
Related Deal, 75
Resuable
BoM, 59
Reusable BoM, 42

S

Sales Engineer, 76
Salesforce, 10
Account, 12
Non-Platform User, 10
Opportunity, 11
Platform User, 10
Project, 11
Save as New Quote Button, 87
Ship to Party, 75
Source, 8
Importing, 39
StrataVAR PQW
Interface, 19
Introduction, 7
Launching, 19
User Interface, 28
Workflow, 14
Summary Quote, 100
Automatic, 103
Manual, 105
Refreshing, 109
Summary Quote Button, 80
Supplier, 8
Switching Between Modes, 21

T

Table Filter, 31

Clearing, 31
Table Grid Pagination, 34
Tabs, 28, 29
Terms, 8
Salesforce, 10

U

User Interface, 19, 28
Filtering, 30
Tabs, 28, 29

V

Value
Defining, 114
VAR, 8
Viewing Field Values, 33
VIP, 34
Configuring, 36
Effective Date, 76
Payout, 76
Recalc Button, 84
Search, 34

W

Workflow
Pricing Quote, 111
Quote Assembly, 70
Using StrataVAR PQW, 14

StrataVAR

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