positiveedge

User Manual

Quotedge User Manual

Contents

1. Purpose

The **Quotedge** application is well designed to suit the business functionalities of **Comparing Prices and Quoting.** The application enhances the necessary built-in quoting capabilities in Microsoft Dynamics CRM. It integrates seamlessly with Microsoft Dynamics CRM, leveraging several built-in capabilities of the Microsoft Dynamics CRM platform. As a result, it provides a smooth user experience when switching between CRM and Quotedge.

Key Features and Functions of the Quotedge Application

The main features and functions of the Quotedge application are:

- Generate multiple quotes from opportunities with automatic carry-over of key fields and line items from the opportunity into the quote.
- Ability to revise quotes and maintain traceability of quote revisions.
- Ability to copy from an existing quote that speeds up the quoting process.
- Multiple price-lists for a quote with multi-currency support can be configured.
- A highly granular product can be configured for a quote with the availability of write-in products.
- Automatic verification of the quote for consistency that makes the process very reliable.
- Multi-tiered pricing for a product based on quantity.
- WS Federation authentication that supports Single Sign-On has been configured.

Intended Audience

This document is intended for the following list of resources:

- Administrator
- Inside Sales Manager
- Inside Sales Person (Finance Manager, Product Manager & VP – Sales)

2. User Roles

Users can perform actions in Quotedge based on their access rights. The following are the user roles:

Administrator

- This user has the privilege to create and delete users.
- This user has the privilege to add or edit the existing price list.
- This user has the privilege to create, edit, activate and delete a quote.
- This user has the privilege to change application settings.

Inside Sales Manager

- This user has the privilege to create, edit, activate and delete a quote.
- This user has the privilege of editing the 'marked up %' of a quote.

Inside Sales Person

- This user has the privilege to create, edit, and delete a quote.

3. Create a Quote

The Quoting process begins with the generation of an opportunity that has qualified after one or more interactions with the customer. The steps below describe the action the user needs to perform to generate a quote. The application provides two ways to create a quote, they are:

- Create a new quote
- Create a quote from existing opportunity

3.1. Login to Quotedge

Log on to Quotedge with application URL, User Name, and Password.

Note: Only authorised persons can log in to the Quotedge application.

Perform the following steps to access the application:

1. Click the link https://quoteedgestage.azurewebsites.net
   The Quotedge Login page appears.

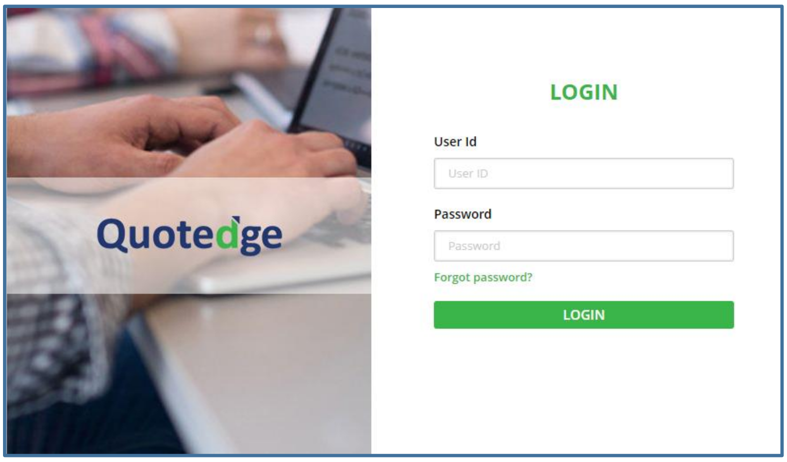

Figure 1: Login Page

2. Enter the User Id, enter the Password, and click **Login**.
   The Quotedge dashboard page appears.

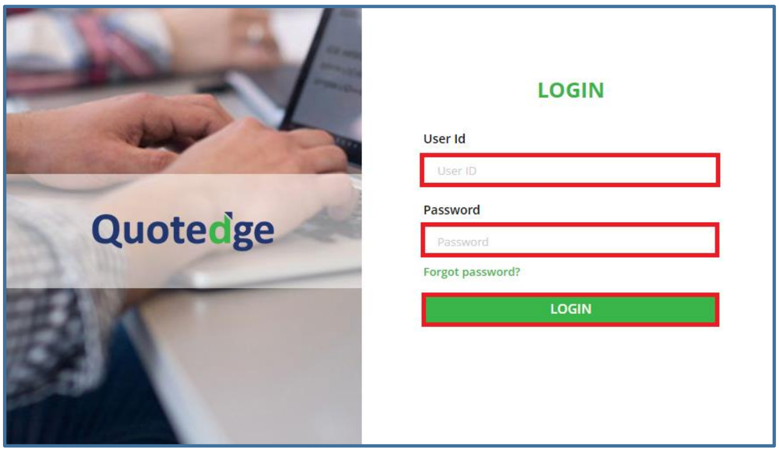

Figure 2: Login Page

On successful login, the user is redirected to a Quotedge dashboard page which is landing page for all the user. Every user has their landing page, and the sample landing dashboard is shown below.

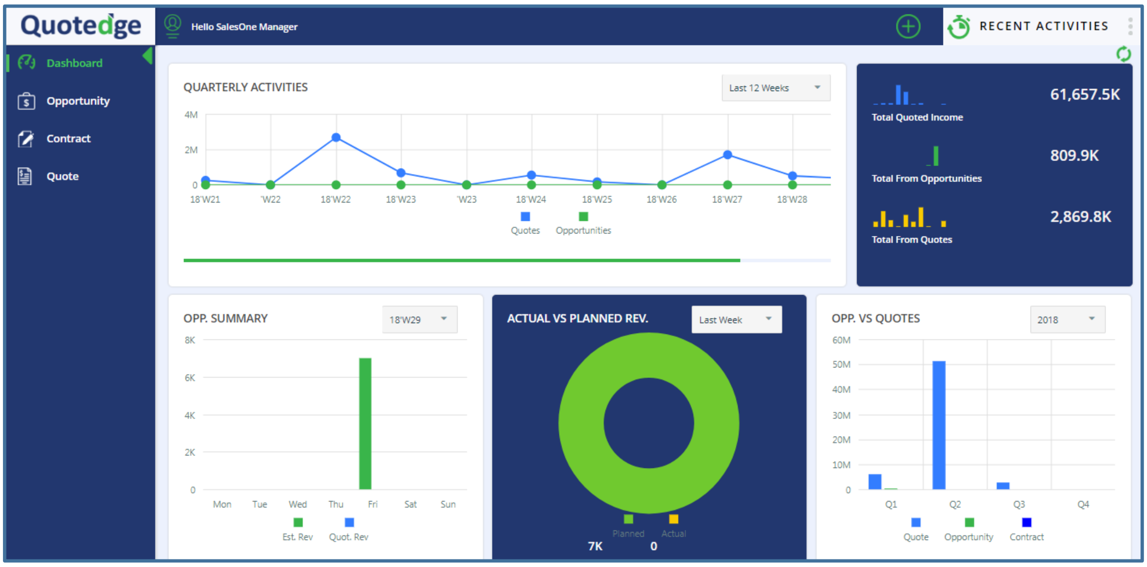

Figure 3: The Quotedge Dashboard Page

3.2. Sales Manager/Sales Person Dashboard Page Functionalities

The following are the dashboard sales manager/sales person page functionalities:

Recent Activities

1. Click **Recent Activities** on the top right of the dashboard page.
   The Opportunities tab, Contracts tab, and Quotes tab list appears.

Figure 4: Recent Activities

2. Click on the **Opportunities** tab to view the recent activities.
   The list of recently created five Opportunities are displayed.

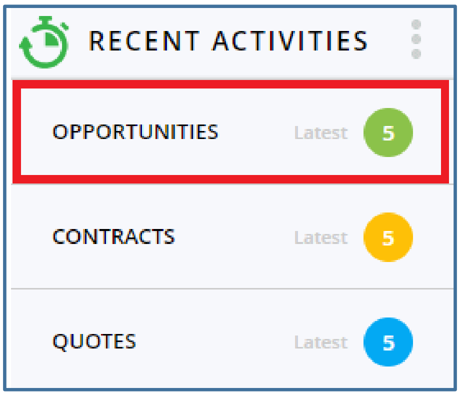

Figure 5: Click Opportunities

3. Click on any of the opportunity from the list.
   The user will be navigated to the 'Opportunities General Information page'.

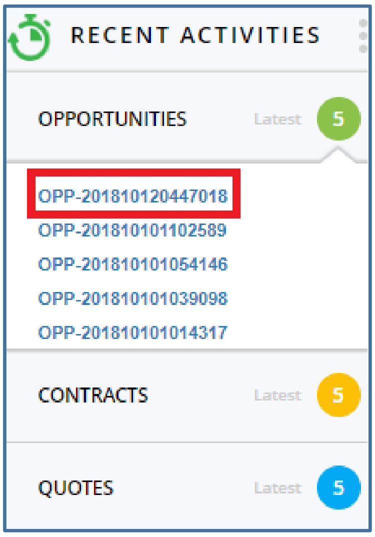

Figure 6: Opportunities list

4. Click on the **Contracts** tab to view the recent activities.
   The list of recently created five Contracts are displayed.

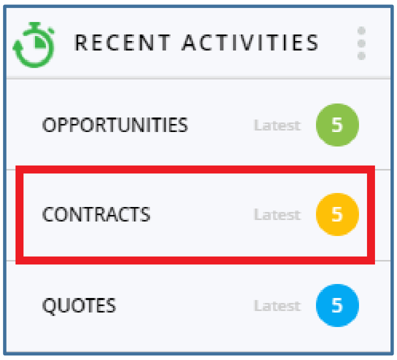

Figure 7: Click Contracts

5. Click on any of the Contract from the list.
   The user will be navigated to the 'Contracts General Information page'.

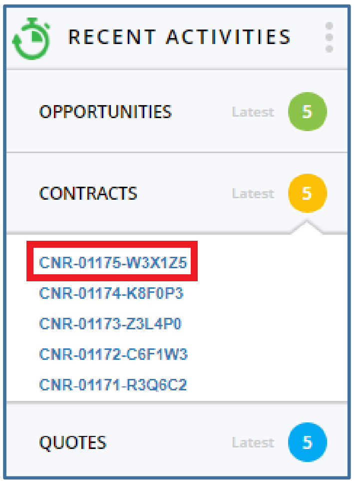

Figure 8: List of Contracts

6. Click on the **Quotes** tab to view the recent activities.
   The list of recently created five Quotes are displayed.

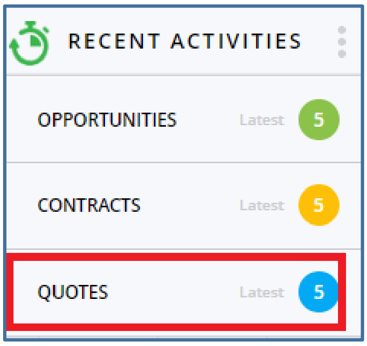

Figure 9: Click Quote

7. Click on any of the **Quote** from the list.
   The user will be navigated to the 'Quotes General Information page'.

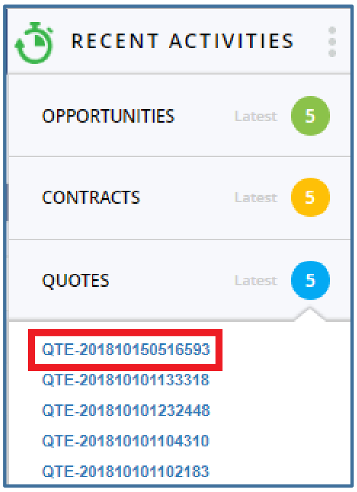

Figure 10: List of Quotes

Refresh Charts

- Click the  (**Refresh Charts**) icon on the top right of the dashboard page to update the dashboard page Charts.

Minimize Tabs

- Click the **Arrow** icon on the top left of the dashboard page to minimize the main dashboard functional tabs.

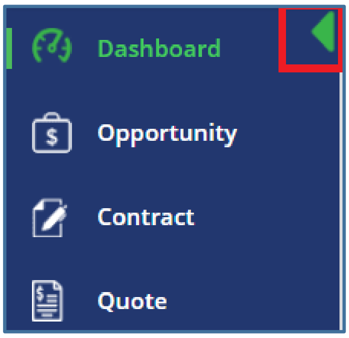

Figure 11: Click Arrow icon

➢ The minimized tabs are shown below.

Figure 12: Minimized Tabs

Dashboard Graphs

- Under **Quarterly Activities** select the time period from the drop-down to view **Quotes** and **Opportunities** activities in a graph.

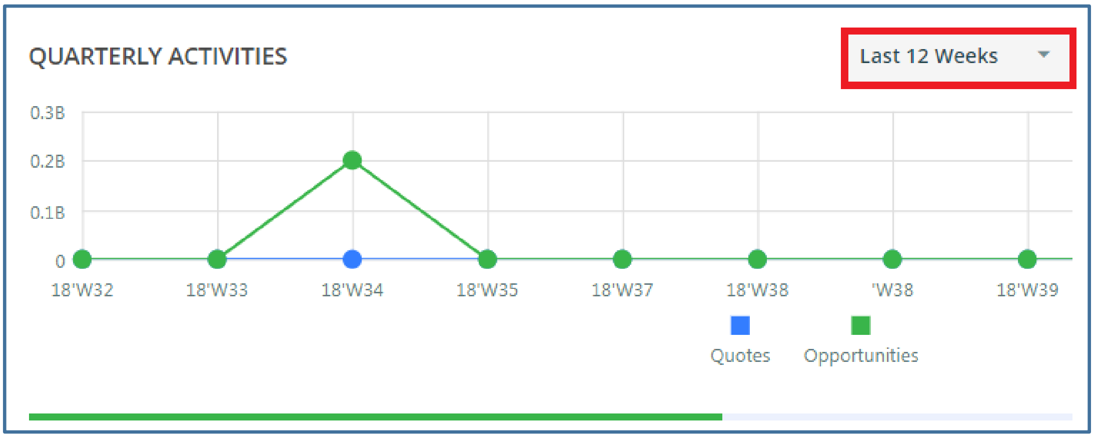

Figure 13: Quarterly Activities Graph

- The Summary of Opportunities and Quotes graph displays the following:
    - Total Quoted Income
    - Total from Opportunities
    - Total from Quotes

Figure 14: Summary of Opportunities and Quotes graph

- Under **Opp. Summary** select the year and the week from the drop-down list to view **Opportunity Summary** activities in a graph.

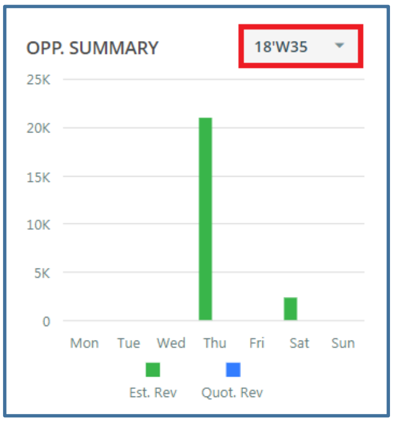

Figure 15: Opportunity Summary Graph

- Under **Actual Vs Planned Revenue amount** select the 'Last Week' or 'Last Month' or 'Last Quarter' from the drop-down to view **Actual Vs Planned Revenue amount** in a graph.

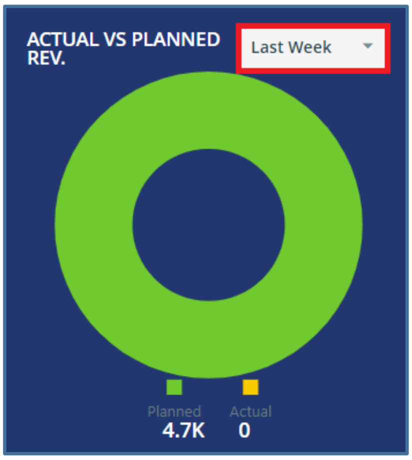

Figure 16: Actual Vs Planned Revenue amount

- Under **Opportunity Vs Quotes Vs Contracts** select the year from the drop-down to view **Opportunity Vs Quotes Vs Contracts** created per quarter in a graph.

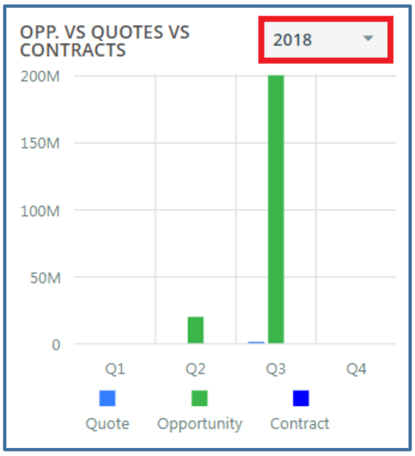

Figure 17: Opportunity Vs Quotes Vs Contracts Graph

View and Search Recent Created Opportunities, Contracts, and Quotes list

Scroll-down the dashboard page to view and search the recently created activities list for Opportunities, Contracts, and Quotes.

- Click **Opportunities** to view the recent 10 opportunities created.
  - Click on the **Opportunity** from the list to navigate to 'Opportunity General Information' page.
- Click **Contracts** to view the recent 10 contracts created.
  - Click on the **Contract** from the list to navigate to 'Contract General Information' page.
- Click **Quotes** to view the recent 10 quotes created.
  - Click on the **Quote** from the list to navigate to 'Contract General Information' page.

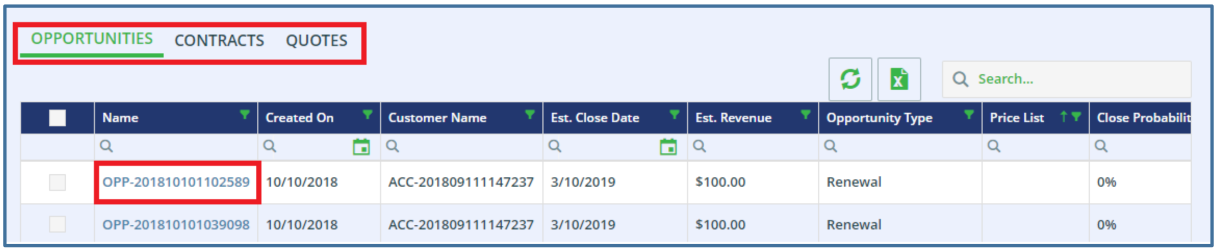

Figure 18: Recent Activities List

The following are the functions available on the recently created activities list in the dashboard page:

- Click the (**Refresh**) icon to update the recent activities list.
- Click (**Export All Data**) icon to download the activity details in excel format in your system.
    - You can download the entire activity details list in excel format by clicking on the **Export All Data** icon.
    - You can download individual activity details in excel format by selecting the check box for the required activity and then click on **Export All Data** icon.

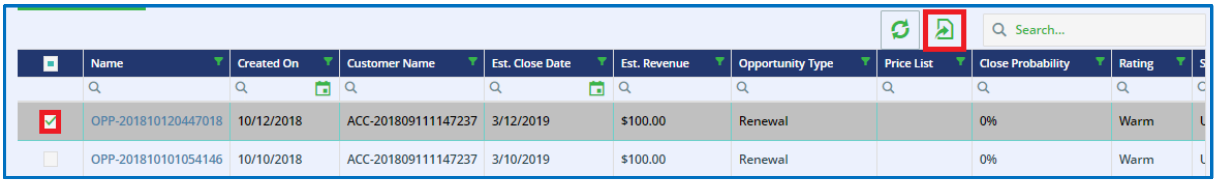

Figure 19: Export All Data

- Enter a search entity in the (**Search**) tab for the global search of recent created activity. The global search searches data from all the columns of the grid.
- Click the (**Filter**) icon to filter the activity list to display by selecting a check box for the required field.
    - Select the checkbox for **Select All** and click **Ok** to display all the list items.

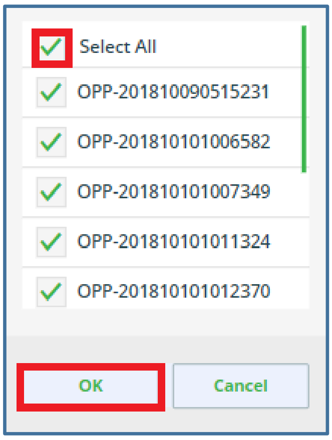

Figure 20: Select All

- Select the checkbox for selected items from the list and click **Ok** to display only the selected items.

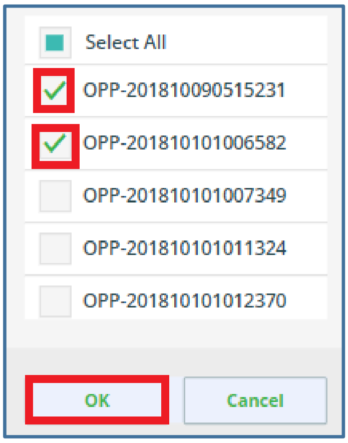

Figure 21: Select the Item

- Click the Price List (**Arrow**) icon in the 'Price List' tab to arrange the recent activity list based on ascending or descending order of the price list.
- Click the (**Search**) icon for the local search of the recent activity list.
  The search filters available for searching the recent activities by **Names** and **Numbers** are:
  - **Contains**
  - **Does not contain**
  - **Starts with**
  - **Ends with**
  - **Equals**
  - **Does not equal**
  - **Reset**

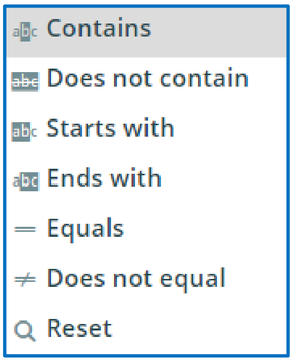

Figure 22: Local Search Filters

The search filters available for searching the recent activities by **Dates** are:

- **Equals**
- **Does not equal**
- **Less than**
- **Greater than**
- **Less than or equal to**
- **Greater than or equal to**
- **Between**

- Reset

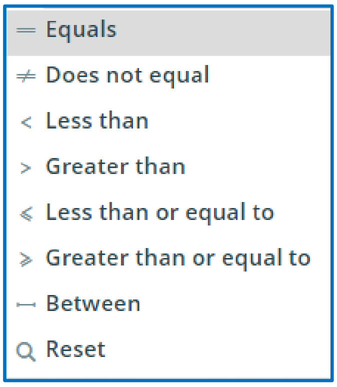

Figure 23: Local Search Filters

- Click (**Calendar**) icon and select the date to search the recent activity by the date.

Create a New Quote from the Dashboard Page

The following are the steps to create a quote from existing opportunity:

1. Click **Create Quote** on the top left of the dashboard page.
   The 'Create Quote' dialogue-box appears.

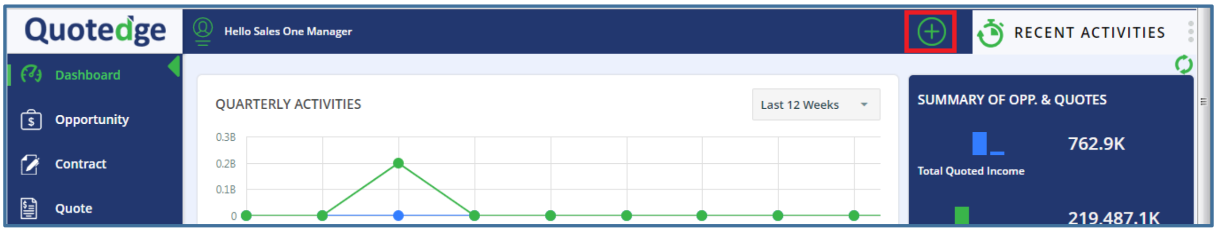

Figure 24: Create Quote

2. Enter the Quote information and then click **Create** to create a new quote.
   The Quote information to fill are:
   - Select the **Opportunity** name from the list, the 'Price List' auto selects for the selected opportunity.
   - Select the **Payment Term** from the drop-down.
   - Select the **Channel Type** from the drop-down.
   - Select the **Currency** from the drop-down.

   Note: 'Is Primary' checkbox can be selected or cleared as per the contract terms.

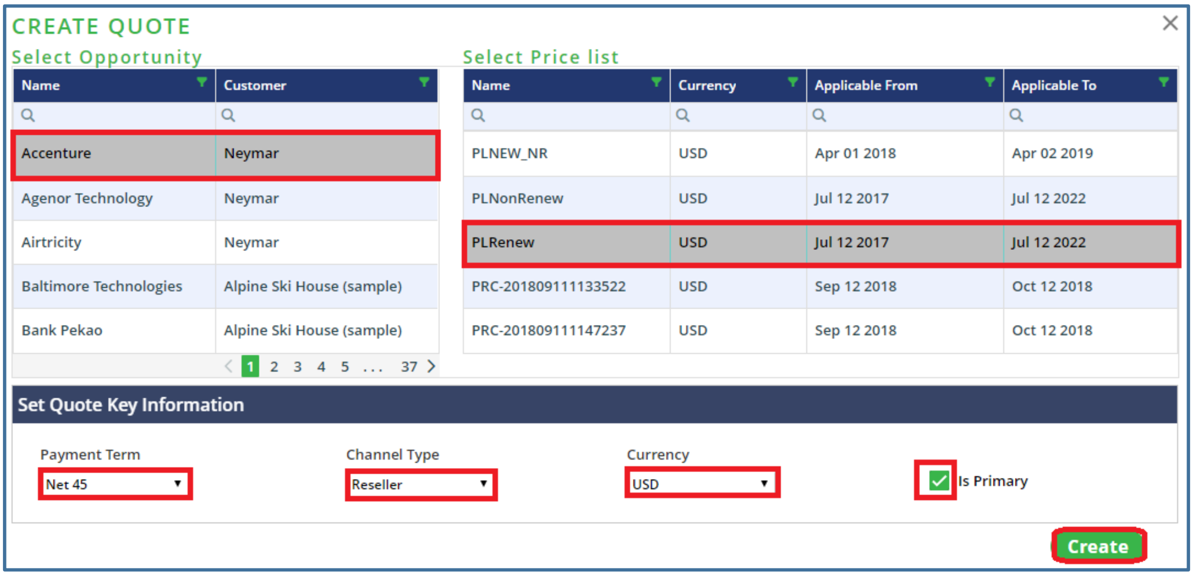

Figure 25: Create Quote

➢ The new quote is created for an existing opportunity. (Refer to section 3.3 for a new quote page)

Logout of the Application

- Click the  (**Logout**) icon on the top left of the page to log out of the Quotedge application.

3.3. Create a New Quote from an Existing Contract

The following are the steps to create a new quote from an existing contract:

1. Click **Contract** tab on the left side of the dashboard page, select the check box for the **Contract** from the contract list to create opportunity and then click **Create Opportunity** on the top right of the page.
   The 'Opportunity created successfully' message popups.

Figure 26: Click Create Opportunity

2. Click **Ok**.
   The ‘General Information’ page of the opportunity appears.

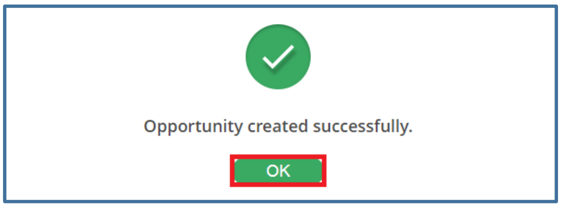

Figure 27: ‘Opportunity created successfully’ message

3. Click **Create Quote** on the right top of the page.
   The ‘Create Quote’ dialogue box appears.

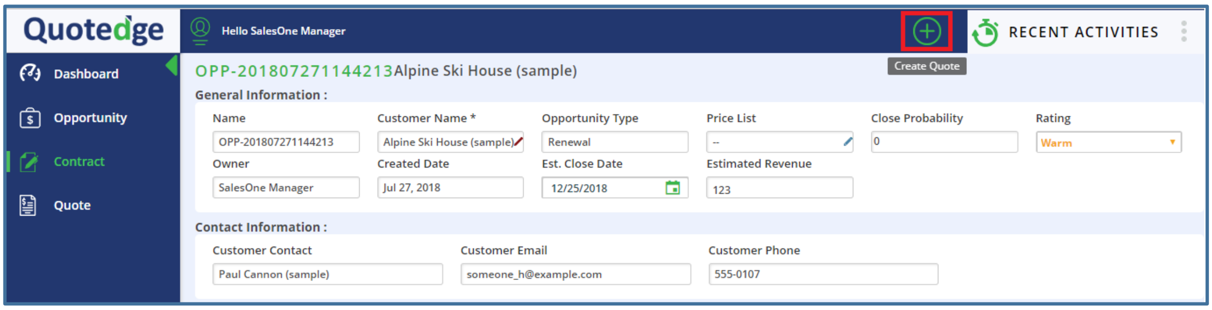

Figure 28: Create a Quote

4. Enter the Quote information and then click **Create** to create a new quote.
   The Quote information to fill are:
   - Select the **Price list** from the list of prices.
   - Select the **Payment Term** from the drop-down.
   - Select the **Channel Type** from the drop-down.
   - Select the **Currency** from the drop-down.

   Note: ‘Is Primary’ checkbox can be selected or cleared as per the contract terms.

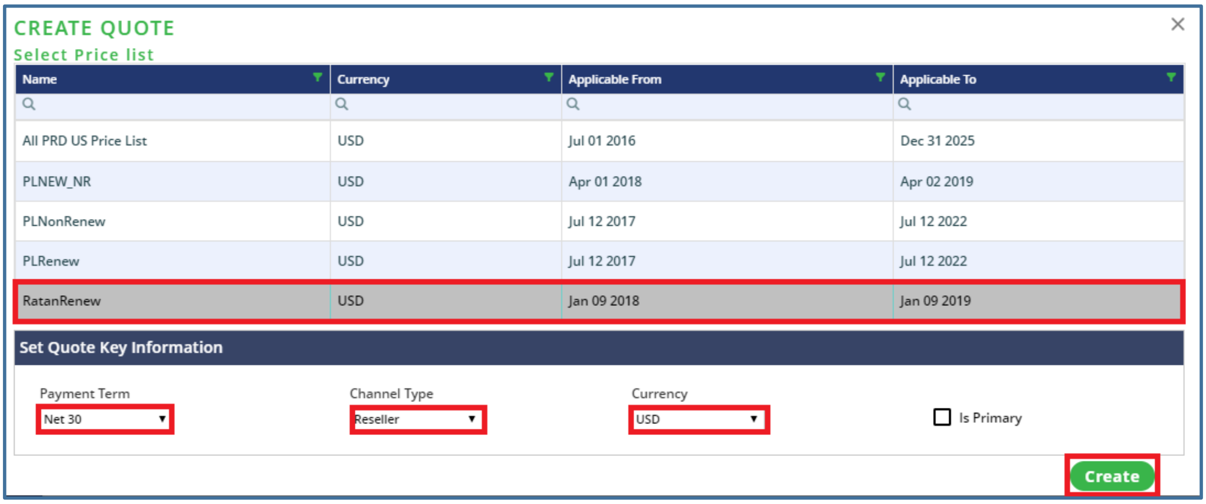

Figure 29: Create New Quote page

➢ The new quote is created for an existing opportunity and is shown below.

- **General Information** section displays all the information in the quote.
- **Customer Information** Section displays the customer details.
- **Ship To Address** section contains shipping details.
- **Bill To Address** section contains Billing Address.
- **Channel Information** section displays reseller or distributor details.
- **Line Items** section displays the product details.

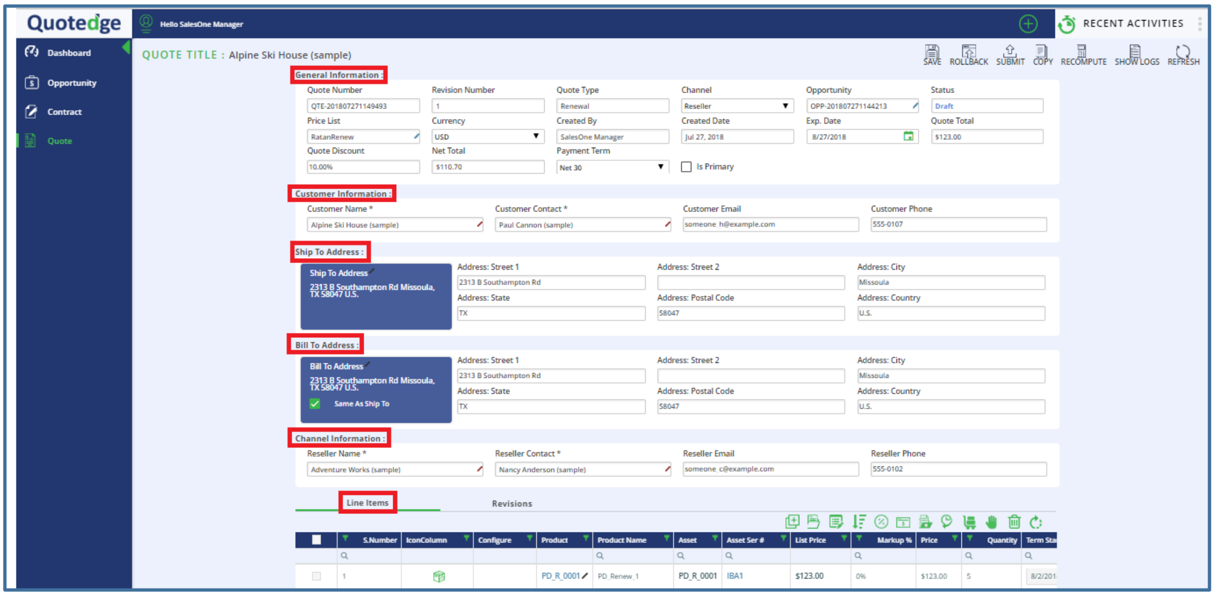

Figure 30: Quote Information Page

3.4. Create a New Quote from an Existing Opportunity

The following are the steps to create a quote from existing opportunity:

1. Click **Opportunity** tab on the left of the dashboard page and then click **Create Quote** on the top right of the page.

The 'Create Quote' dialogue-box appears.

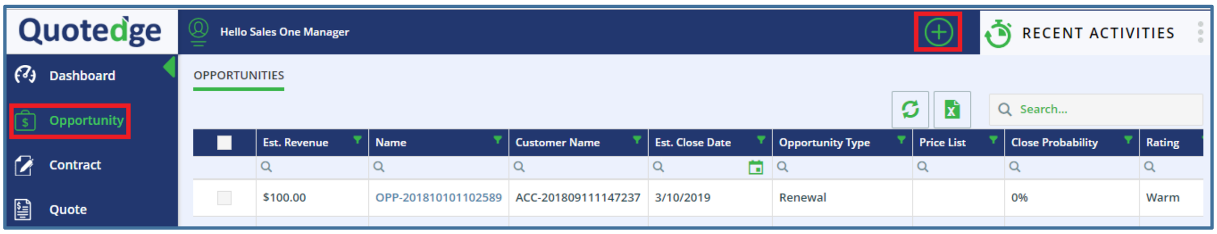

Figure 31: Click Opportunity

2. Enter the Quote information and then click **Create** to create a new quote.
   The Quote information to fill are:
   - Select the **Opportunity** name from the list, the 'Price List' auto selects for the selected opportunity.
   - Select the **Payment Term** from the drop-down.
   - Select the **Channel Type** from the drop-down.
   - Select the **Currency** from the drop-down.

   Note: 'Is Primary' checkbox can be selected or cleared as per the contract terms.

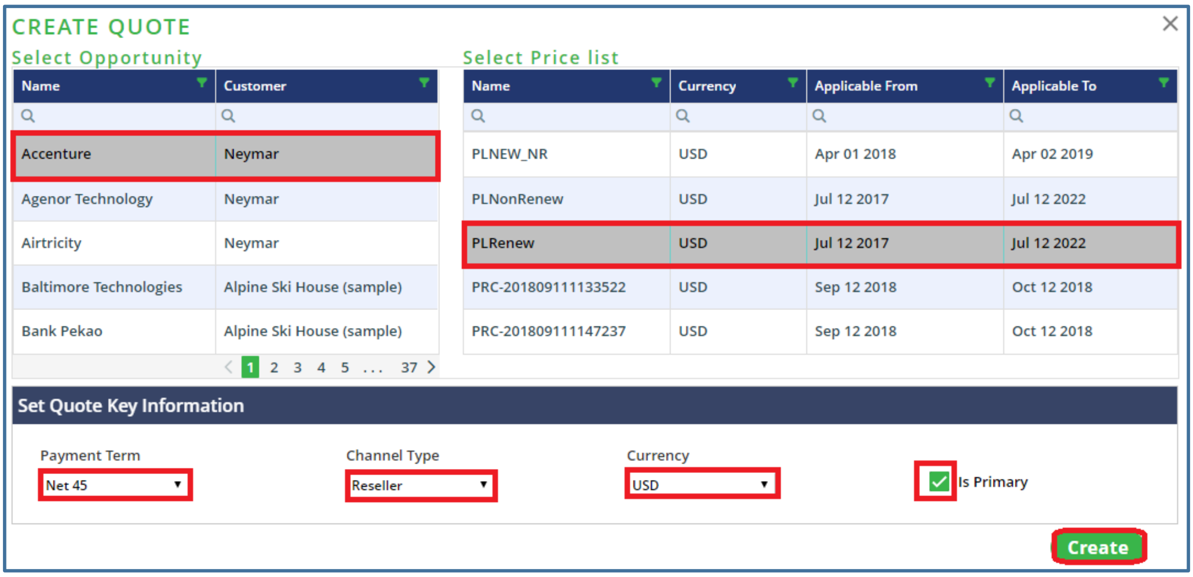

Figure 32: Create Quote

➢ The new quote is created for an existing opportunity. (Refer to section 3.3 for a new quote page)

3.5. Create a New Quote from the Quote Tab

The following are the steps to create a quote from existing opportunity:

1. Click **Quote** tab on the left of the dashboard page and then click **Create Quote** on the top right of the page.
   The 'Create Quote' page appears.

Figure 33: Create a Quote

2. Enter the Quote information and then click **Create** to create a new quote.
   The Quote information to fill are:
   - Select the **Opportunity** name from select opportunity list, the ‘Price list’ auto selects for the selected opportunity
   - Select the **Payment Term** from the drop-down
   - Select the **Channel type** from the drop-down.
   - Select the **currency** from the drop-down and then click **Create**.

   Note: ‘Is Primary’ checkbox can be selected or cleared as per the contract terms.

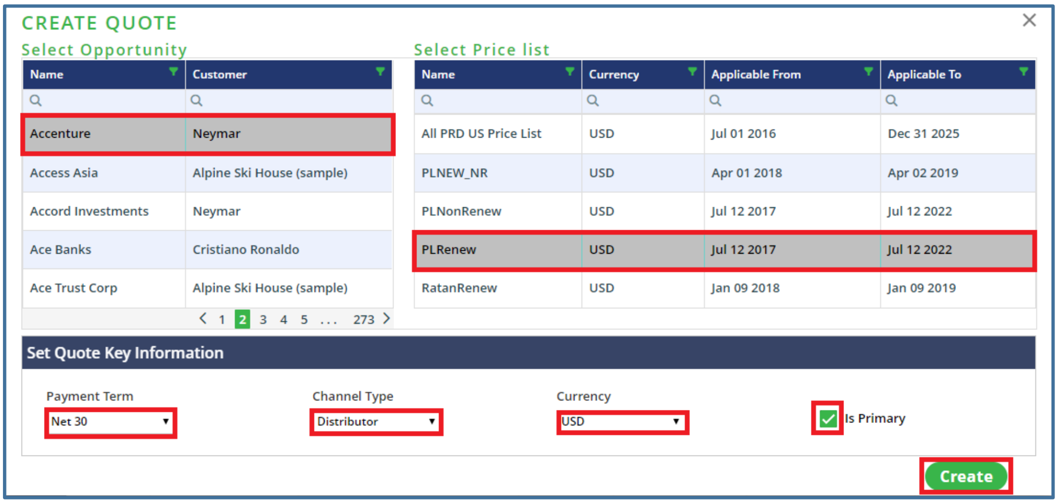

Figure 34: Create New Quote Page

- ➢ The new quote is created for an existing opportunity. (Refer to section 3.3 for a new quote page)

3.6. Edit a Quote

Changes can be made to any of the editable fields while the quote is in the Draft status. After that point, the quote is read-only.

- ➢ The changes made for a quote is not saved permanently until you click the **Save** icon.
- ➢ Any changes made since the last save is logged in the Edit Trail, you can access it by clicking the **Show Logs** icon.
- ➢ A quote reverses to the previously saved version by clicking on the ‘**Rollback**’ icon or the ‘**Refresh**’ icon.

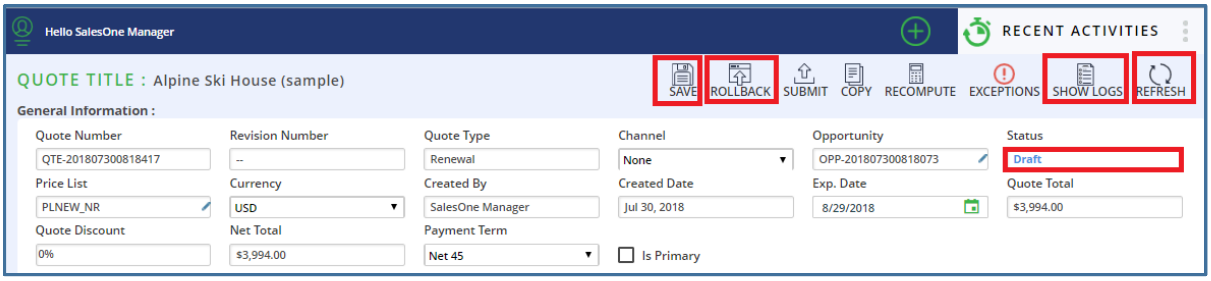

Figure 35: Edit a Quote

4. Product Configuration

4.1. Edit a Line Item Field

These fields are available in a table below the form containing the quote fields. Each of the rows can be edited by double-clicking on the row. The user can modify field values such as price, quantity and few other editable fields.

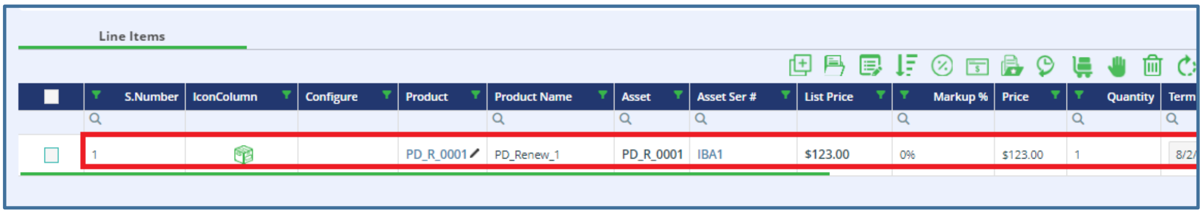

Figure 36: Line Item Fields

4.2. Add Products

Addition of products is done using the ‘Add’ icon on the toolbar above the Line Items table.

1. Click **Add Products** on the toolbar above the Line Items table.
   The ‘Add Products’ dialogue box appears.

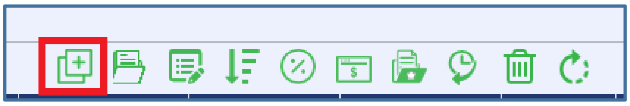

Figure 37: Add a Product

2. Select the checkbox for the products from the list on the left side of the dialogue box and click **Add**, the product gets added on the right side of the dialogue box. Click **Save**.
   The new product gets added to the quote.

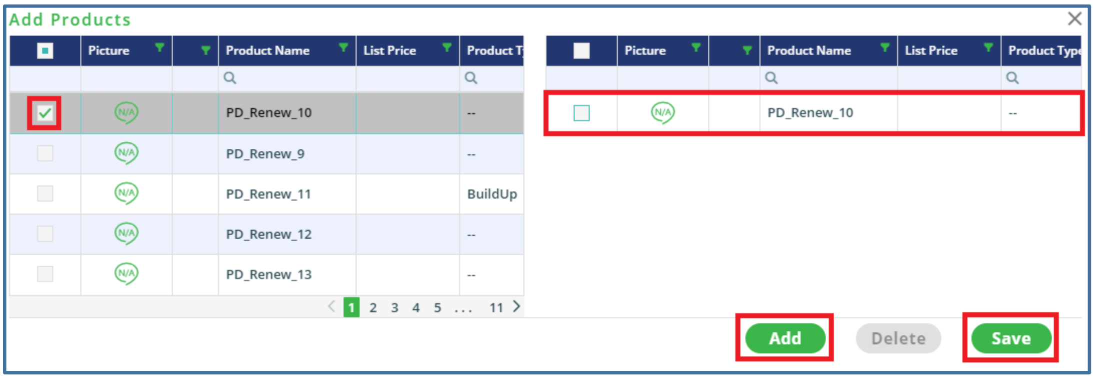

Figure 38: Add a Product Page

4.3. Add Spool

This feature qualifies collective products as a set or finished product by assembling the products to form a set. Furthermore, each of the products within a spool can be edited to update the cost, quantity or the list price.

1. Click **Add Spool** on the toolbar above the Line Items table.
   The 'Add Spool' dialogue box appears.

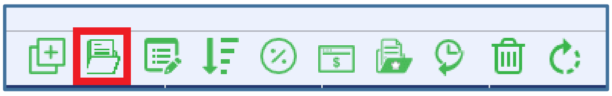

Figure 39: Add a Spool

2. Enter the Spool Name and select the list of products and click **Add**. The selected products are added on the right side of the dialogue box, click **Save**.
   The selected products under spool name are added to the quote.

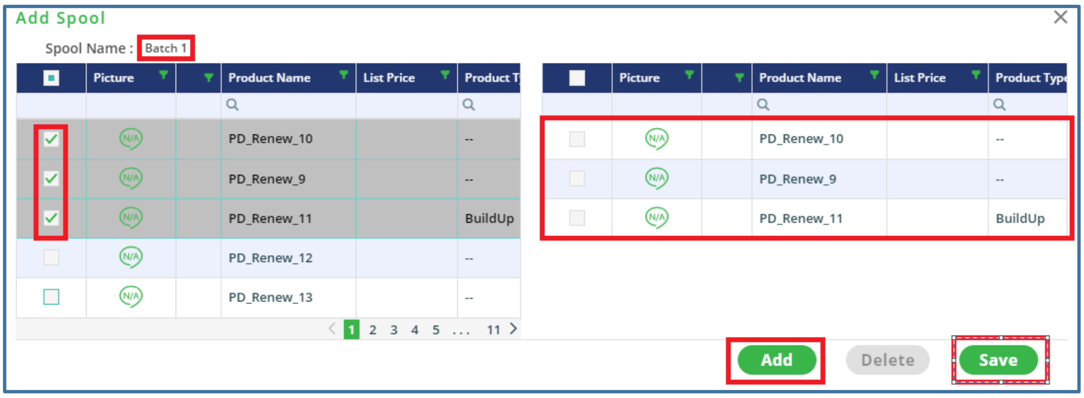

Figure 40: Add a Spool Page

- The product added to the item list under the spool name Batch1 is shown below.

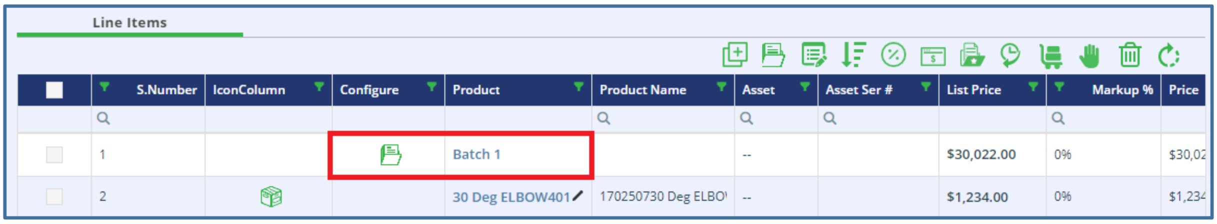

Figure 41: Product Added with a Spool Name.

- The (**spool**) icon under 'Configure' tab identifies the spool products in the 'Line Item' grid. This implies that a spool can be configured only on 'Standard Products'.
- The user can edit a spool line item by clicking the (**spool**) icon.

4.4. Add Write-In Product

If the product to be included is not part of CRM product catalogue, then the user has a choice of introducing new product along with its 'price list' to the line items directly at the grid level.

1. Click **Add Write-In Product** on the toolbar above the Line Items table.
   The 'Add Write-In Product' dialogue box appears.

Figure 42: Add Write-In Product

2. Enter the Product Name, enter the List Price, enter the Quantity, enter the Discount value and then click **Save.**
   The Write-In product is added to the quote.

Figure 43: Add Write-In Product Page

- The write-in product with name 'Bolt' added to the item list is shown below.

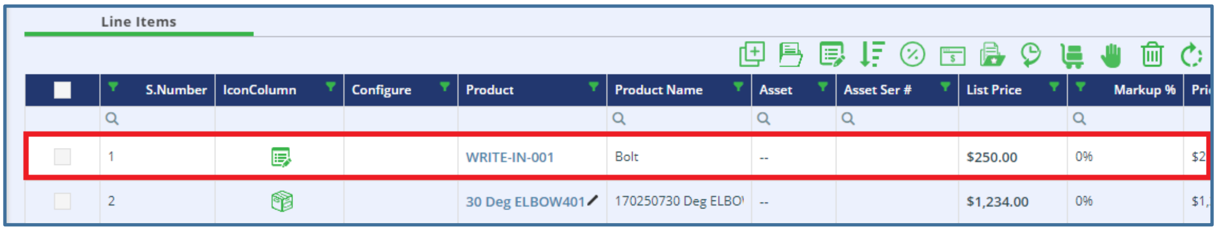

Figure 44: Write-In Product Added to Quote List

4.5. Discount Log

The Quotedge application has an additional feature of providing discounts on the existing price lists.

1. Enter the % of discount to be provided for the products in quote list and click anywhere on the page for the changes to be reflected.
   The new discount is applied for the product.

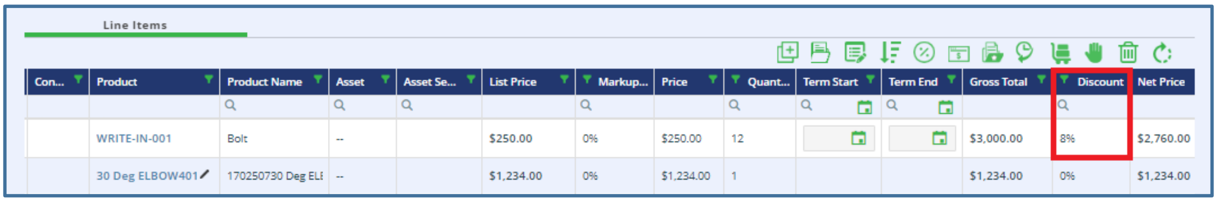

Figure 45: Enter a Discount Value

2. Click **Discount log** on the toolbar above the Line Items table.
   The ‘Discount log’ dialogue box appears.

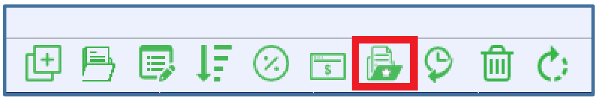

Figure 46: Discount Log

- The % of discount updated for any given line item is stored in the ‘Discount Log’ until the quote is ‘Saved’. Once the changes are saved, the latest or the latest ‘Discount %’ moves from ‘Discount Log’ to ‘Discount Log History’.
- The Discount log dialogue box is shown below.

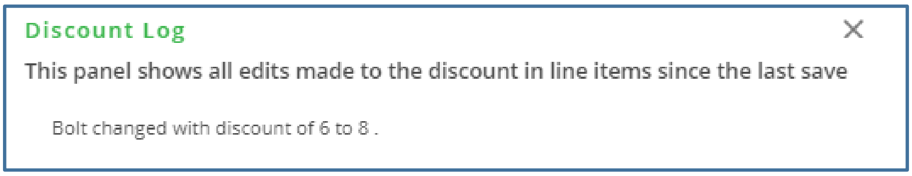

Figure 47: Discount Log Dialogue Box

4.6. Discount Log History

Once the discount % of a line item is saved, the ‘Previous Discount’ field shows a previous discount figure (in %), and ‘Current Discount’ field shows the updated and saved discount figure (in %) along with the date and time the discount item was saved.

1. Select the check box for the product from quote list to check discount history and then click **Discount History** on the toolbar above the Line Items table.
   The ‘Discount Log History’ dialogue box appears.

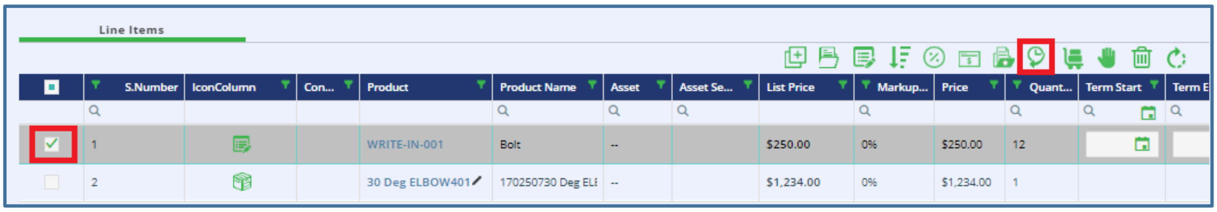

Figure 48: Discount Log History

➢ The ‘Discount Log History’ dialogue box is shown below which displays the log history for the product.

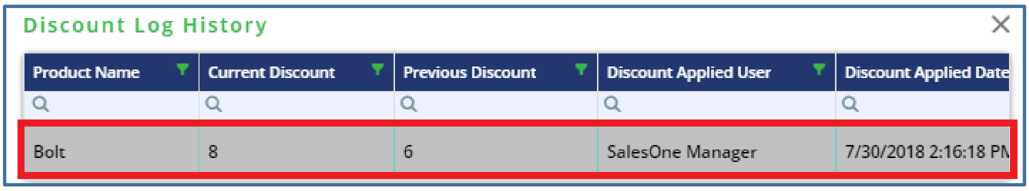

Figure 49: Discount Log History Dialogue box

4.7. Bulk Product Discount

A particular product can be listed multiple times. The same product can appear in both ‘Line Item’ list and also in ‘Spool’. Discounts can be provided to the products at various levels.

1. Click **Bulk Discount** on the toolbar above the Line Items table.
   The ‘Bulk Discount’ Dialogue box appears.

Figure 50: Bulk Product Discount

2. Enter the discount value, select the products type as All, or Line Items, or Spool from Line Items dropdown, click **Apply** and then click **Submit**.
   The discount is applied to the selected list items.

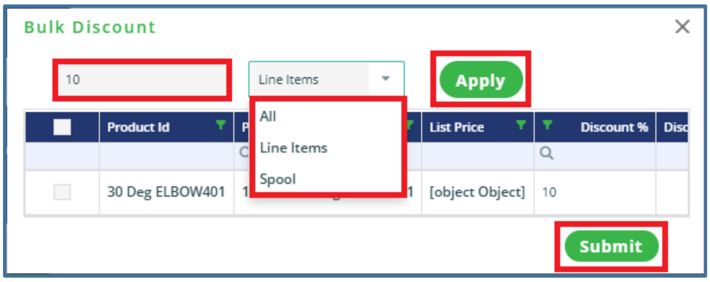

Figure 51: Bulk Product Discount Page

➢ The discount amount after applying Bulk Product Discount is shown below.

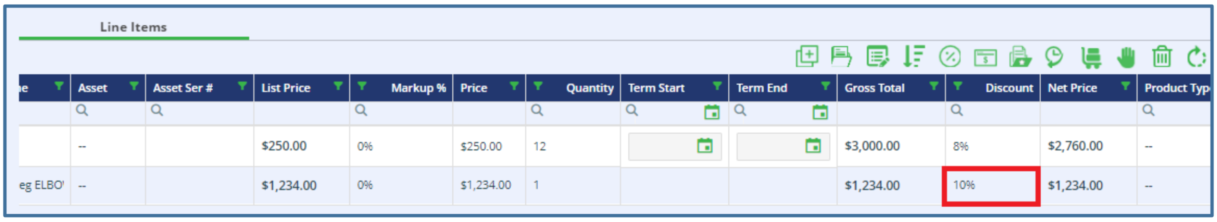

Figure 52: Bulk Product Discount Applied for a Product

4.8. Bulk Markup

Markup or Margin % is one other feature introduced within the Quotedge solution. This feature gives customers the flexibility to adjust their margins on a case-to-case basis. It helps in maximizing profitability using a defined markup pricing. **Markup** is added to the total price incurred on a line item; to create a profit.

Markup Discount can either be given at individual line item level or a common % of markup discount on collective line items.

1. Click **Bulk Markup** on the toolbar above the Line Items table.
   The 'Bulk Markup' dialogue box appears.

Figure 53: Bulk Markup

2. Enter the discount value, select **All** products or **Selected** products from the select drop-down, click **Apply** and then click **Submit**.
   The Markup% value gets updated for the quote product list.

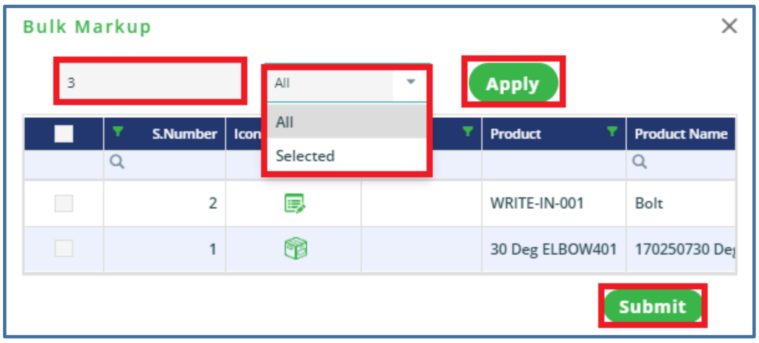

Figure 54: Bulk Markup Page

➢ The Markup% updated for the products in quote list is shown below.

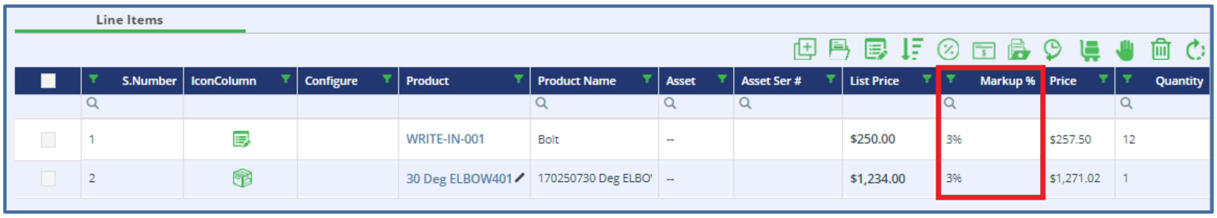

Figure 55: Bulk Markup Applied for a Product

4.9. Remove the Line Items

'Remove Line Items' button in the 'Line Items' section, is used to delete one or more line items from the line items grid.

1. Select the checkbox of the product you want to remove and then click **Delete** on the toolbar above the Line Items table.
   The 'Are you sure you want to delete these rows?' message appears.
   Note: For example, the line item with product name bolt is selected.

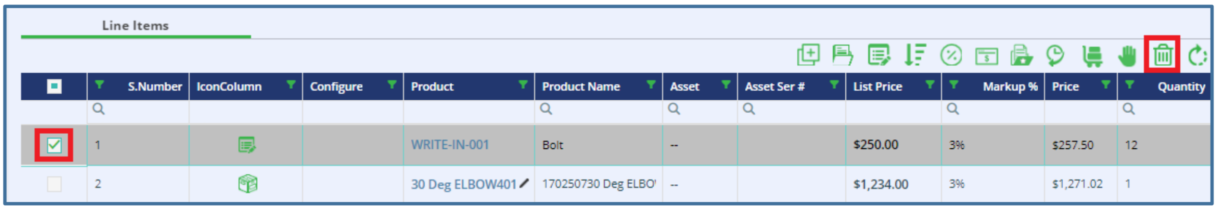

Figure 56: Remove Line Items

2. Click **Yes**
   The 'Delete successfully' dialogue box appears.

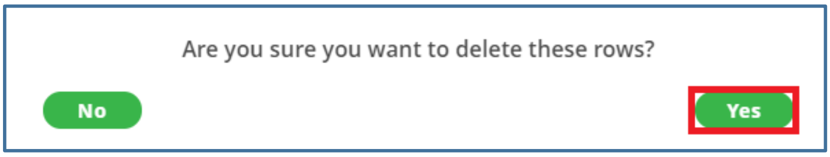

Figure 57: Delete Message

3. Click **Ok**
   The line item is deleted from the product list.

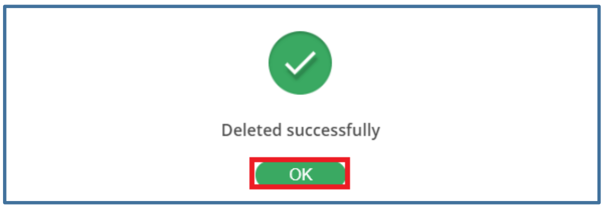

Figure 58: Delete Successful Message

➢ The product list for a quote after deleting the product name 'bolt' is shown below.

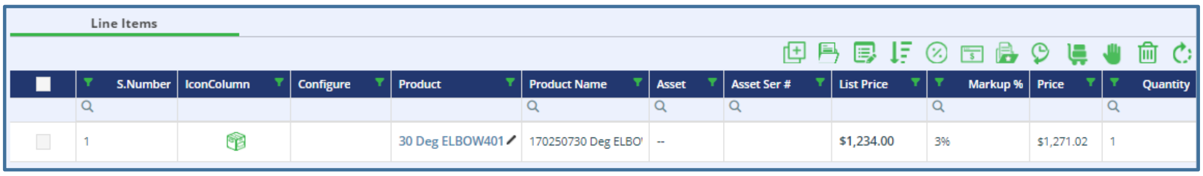

Figure 59: After Deleting Line Item with Product Name 'Bolt'

5. Quote Configuration

5.1. Approve/Reject a Quote

A quote is submitted for approval once the user does all the changes and when the quote is in its final form. Once a quote is submitted, it is read-only, and no further changes are possible.

- On the quote information page, click **Submit** to submit the quote for approval.

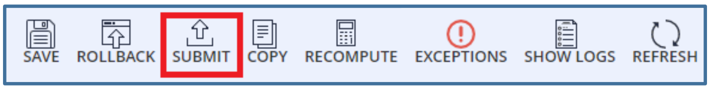

Figure 60: Submit Quote for Approval

- ➢ The status of Quote changes to 'In Approval'.
- ➢ **Approve** button and **Reject** button is enabled for further process.

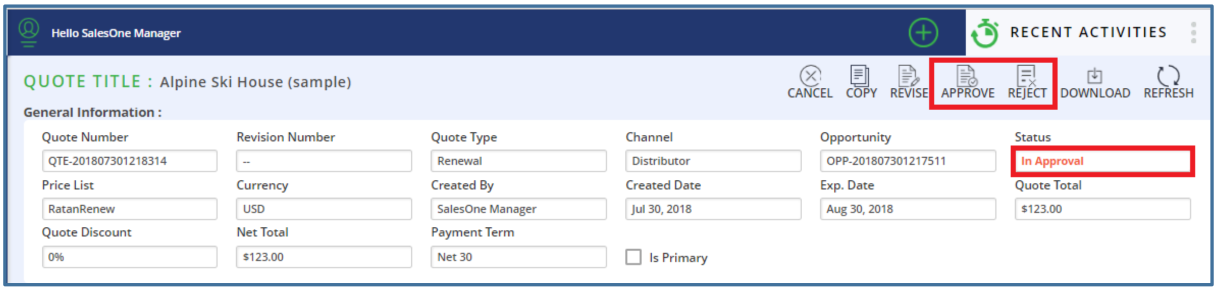

Figure 61: Status as In Approval

✓ **If a sales manager wants to approve the quote,**

1. Click **Approve**

   The dialogue box to enter the approve comment appears.

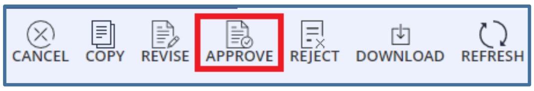

Figure 62: Click Approve

2. Enter the comment and click **Save**.

Figure 63: Approve Comment

- ➢ The Quote status updates to 'Approved'.
- ➢ The **Publish** option enables.

3. Click **Publish**

   The 'Publish' page appears.

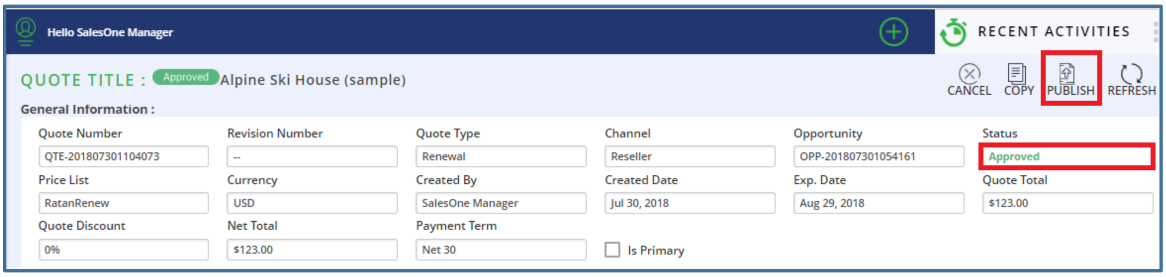

Figure 64: Status as Approved

4. Click **Save**

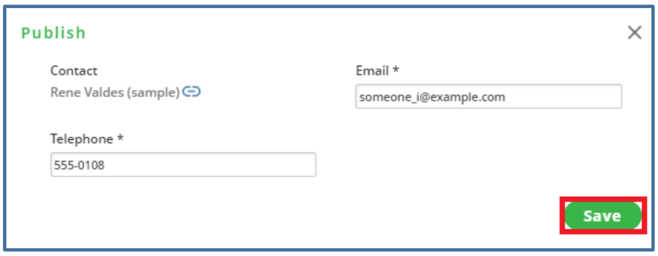

Figure 65: Publish Page

➢ The quote status changes to **Published**.

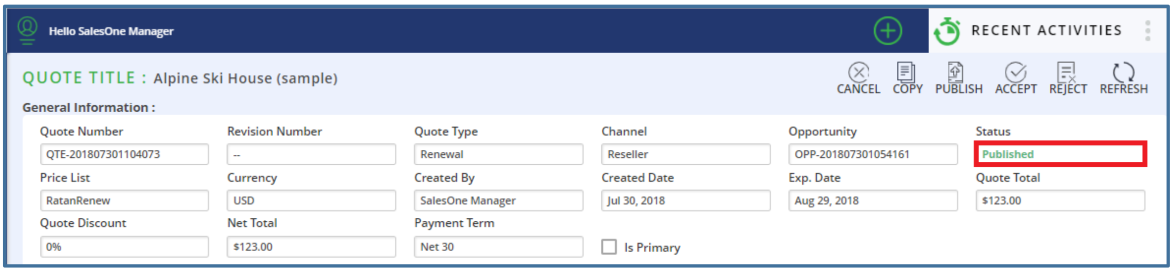

Figure 66: Status as Published

✓ **If a sales manager wants to reject the quote,**

1. Click **Reject**

   The dialogue box to enter the reject comment appears.

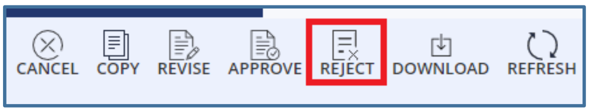

Figure 67: Click Reject

2. Enter the comment and click **Save**.

Figure 68: Reject Comment

➢ The status of the quote changes to **Rejected.**

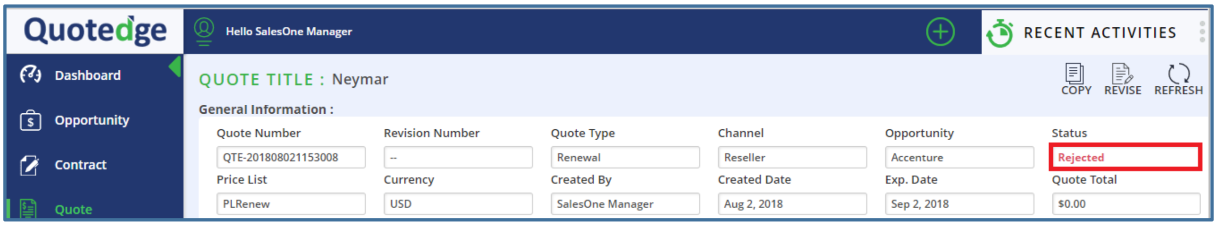

Figure 69: Quote Status as Rejected

5.2. Revise a Quote

Revising cancels and close the current version of the quote, make a replica of it with the same quote number and a revision number incremented by one.

- On the quote information page, click **Revise.**

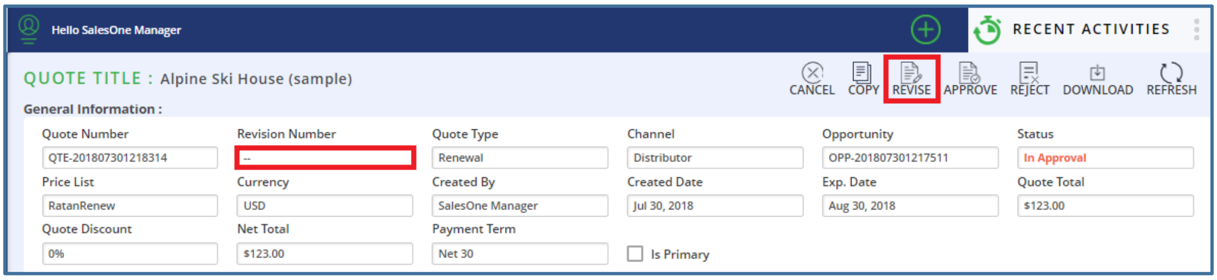

Figure 70: Click Revise

➢ The revision number of the quote incremented by one.

➢ The status of the new quote updates as a **Draft** so the user can make any necessary changes.

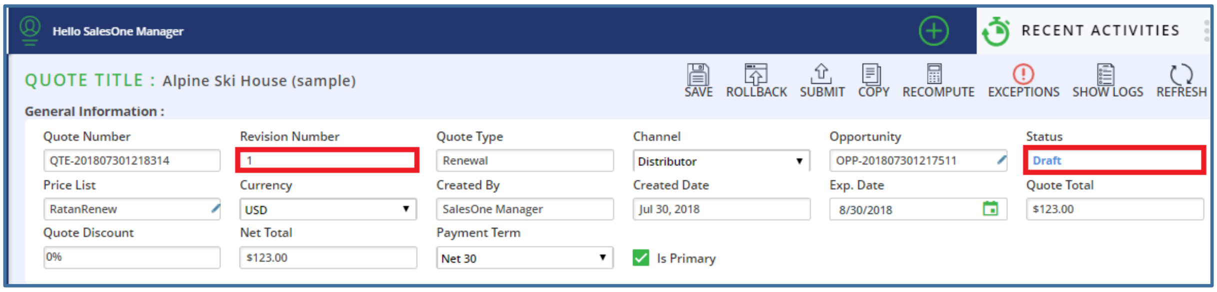

Figure 71: Status as Draft

5.3. Cancel a Quote

A quote can be cancelled at any time before sales order generation.

- On the quote information page, click **Cancel.**

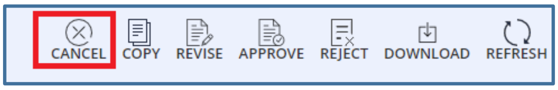

Figure 72: Click Cancel

➢ The quote status is changed to 'Cancelled' for such a quote, and it is closed and read-only.

➢ The only operation that can be performed on a cancelled quote is to copy it.

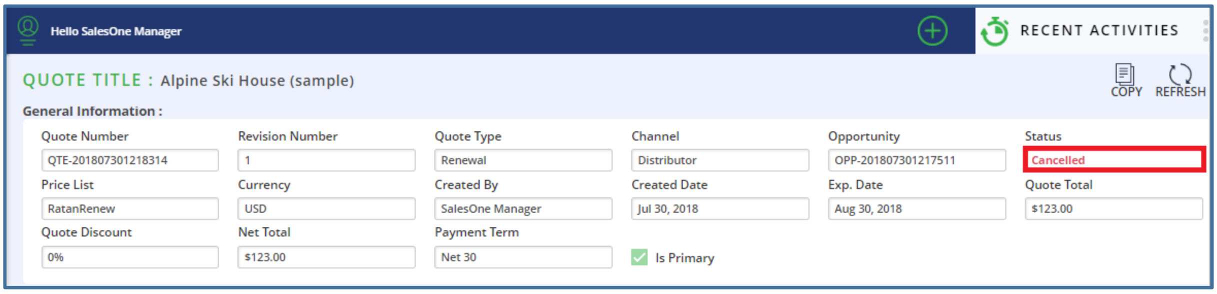

Figure 73: Quote Status as Cancelled

5.4. Copy a Quote

A quote can be copied at any time, even after sales order generation. The copy button creates a replica of the quote, updating the created date.

- On the quote information page, click **Copy**.

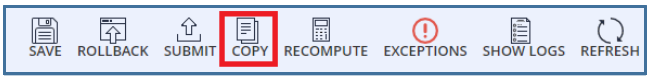

Figure 74: Click Copy

- ➢ A new quote Number generates.
- ➢ The Revision Number resets to zero, and the opportunity field is unset.
- ➢ The new quote is created in **Draft** status and the user requires to set an Opportunity to save the quote since it is a required field.

5.5. Show Exceptions for the Quote Approval

This option displays all the exception field details on the quote to submit for approval.

- On the quote information page, click **Exceptions**.
  The 'Exceptions' dialogue box with a list of exceptions for quote approval appears.

Figure 75: Click Exceptions

- ➢ The Exception dialogue with a list of exceptions is shown below.

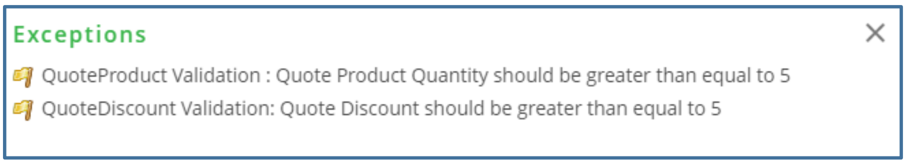

Figure 76: Exceptions Dialogue Box

6. User Administration

This section provides an overview of rights and the levels of security within 'Quotedge Solution' model. Also, the user access to the Quotedge application and the individual actions that users can perform within the application.

6.1. Admin Dashboard Page Functionalities

Login Quotedge with the administrator username and password. The dashboard is the first page which shows up when logged in as an Administrator. The page graphically depicts user statistics such as:

- ➢ The number of times the users logged into the Quotedge application.
- ➢ The number of times users were locked out.
- ➢ The number of times the user's password was reset.

Note: The data visualise various scopes of time, such as, By Month, By Week, By Day or By Hour.

Figure 77: Administrator Dashboard Page

1. Under **Usage Metrics** select an 'Hourly' or 'Daily' or 'Weekly' or 'Monthly' from the drop-down to view the data in graph.
2. **Recent Users** lists recent 10 users logged in to the Quotedge application.

Figure 78: Recent Users

3. Click the **Login Id** from the 'Recent Users' list to view the recently logged in user stats. The selected user's stats are displayed under **User Stats** on the right side of the users list.

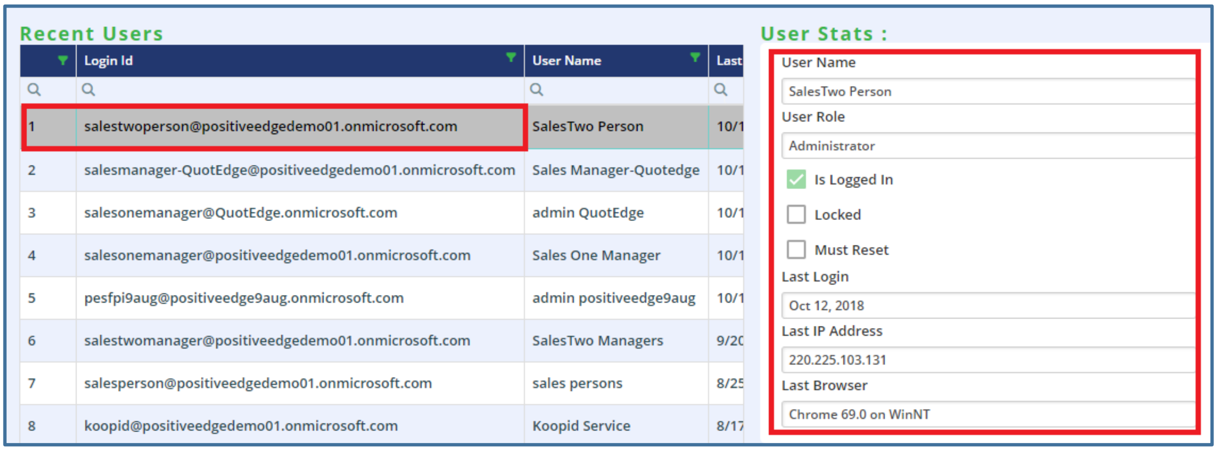

Figure 79: User Stats

4. Click the  (**Logout**) icon on the top left of the dashboard page to log out of the application.

5. Click the  (**Arrow**) icon next to the dashboard tab to minimize the Admin dashboard page tabs.

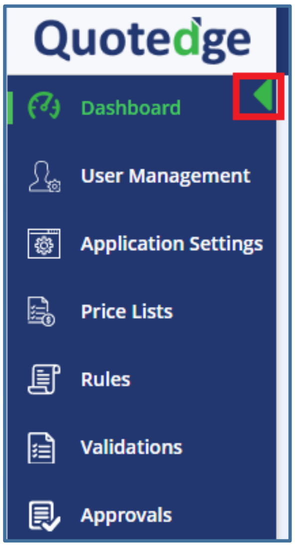

Figure 80: Click Arrow Icon

➢ The minimized dashboard page tabs image is shown below.

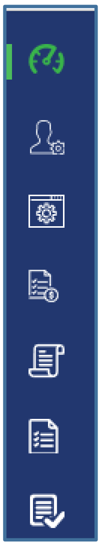

Figure 81: Minimizes Dashboard page Tabs

6.2. Add a New User for the Sales Team

The administrator can add or remove user access to the application and configure the user roles.

1. Click the **User Management** tab on the top left of the dashboard page.
   The user management page appears which displays the list of Quotedge users.

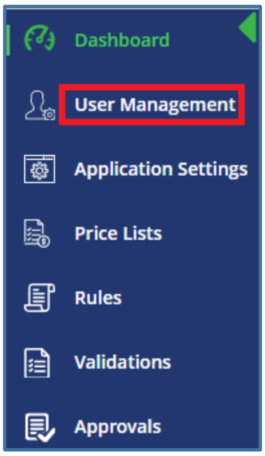

Figure 82: User Management

2. Perform following actions on the 'User Management' page.
   - Click **Refresh** to update the CRM entries in the Quotedge.
   - Click **Welcome** to send a welcome mail to the user.
   - Click **Unlock** to enable the user for accessing CPQ.
   - Click **Lock** to disable the user from accessing CPQ.
   - Click **Save** to save the user updates and a new user.
   - Click **Delete** to delete the existing user.
   - Click **Create** to clear the user details.

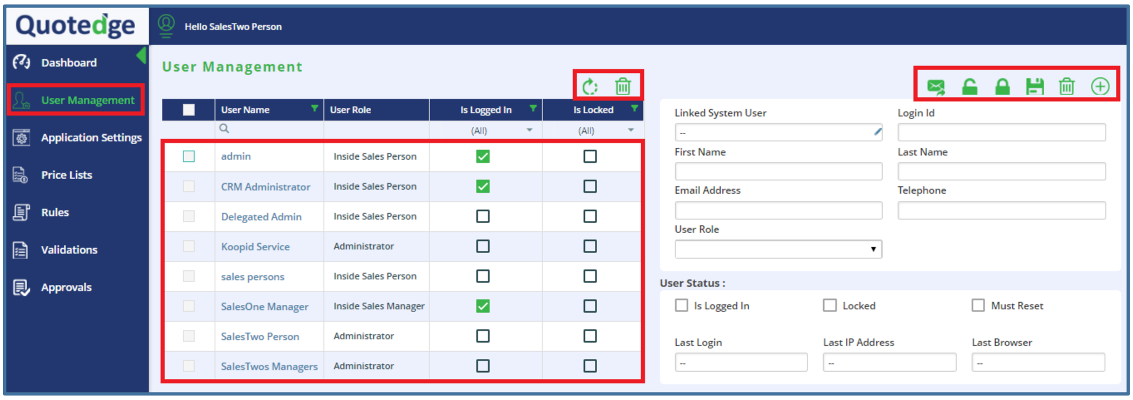

Figure 83: User Management Page

2. Click  (**Edit**) icon under **Linked System User** to create a new user by picking existing CRM users along with their details from CRM.
   The ‘Linked System User’ dialogue box appears.

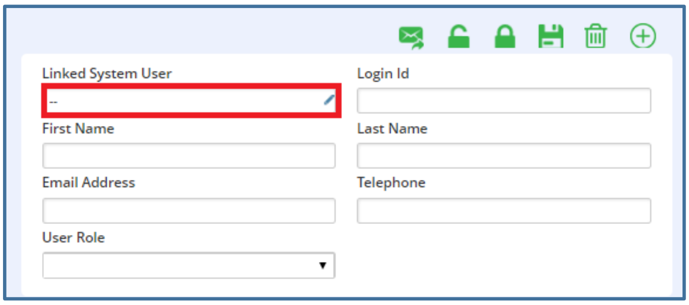

Figure 84: Linked System User

3. Select the user from the name list and then click **Save**.

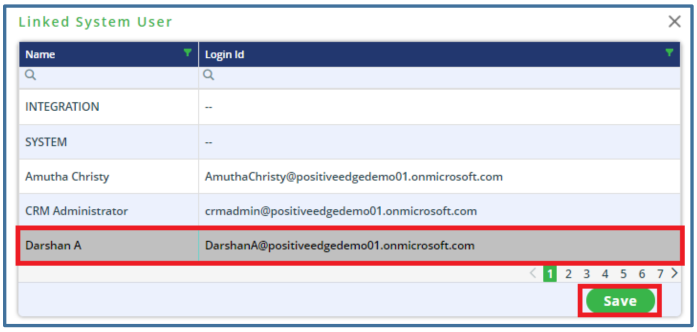

Figure 85: Linked System User

4. The existing user details get updated in the user management page, click **Save** to create a new Quotedge user in the CRM.

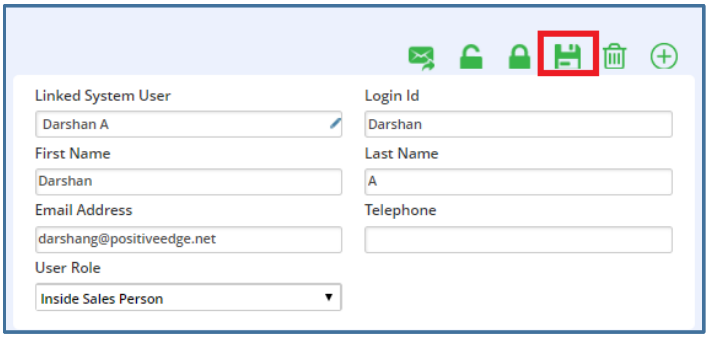

Figure 86: Click Save

5. To edit the user information, select the checkbox of the user from the user name list and edit the user detail opened on the right side of the page. Click **Lock/Unlock** to Lock/Unlock the user and then click **Save**.
   - ➢ The user information gets updated.
   - ➢ **Is Locked** checkbox gets updated for the user.
   - ➢ The **User Status** displays the present status of the selected user.

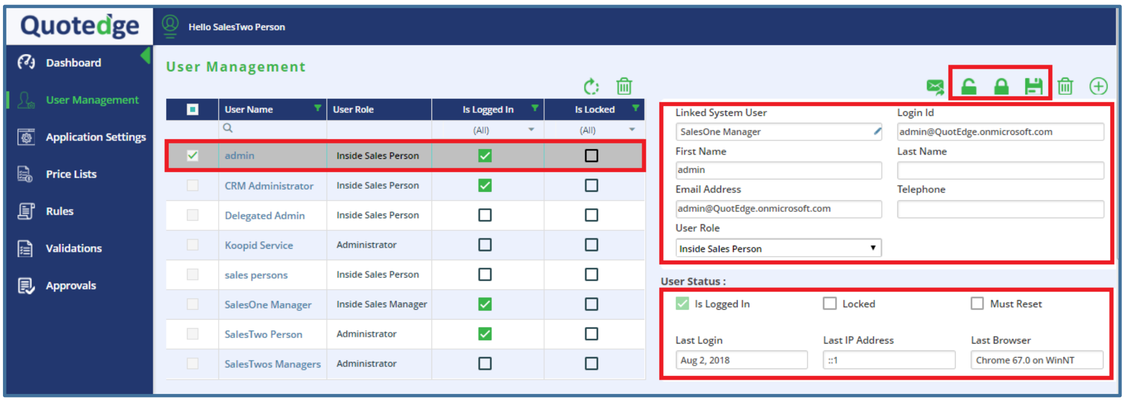

Figure 87: User Management Page

6.3. Apply Default Settings for a Quote

The admin can set the default terms for the creation of a quote in the Application Settings section. The terms defined in this section is default displayed in fields under ‘Quote General Information’ page for a quote.

1. Click **Application Settings** tab on the left side of the dashboard page.
   The ‘Application Settings’ page appears.

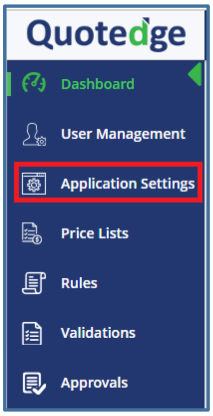

Figure 88: Click Applications Settings

2. Enter all the details under various sections in 'Application Settings' page and click **Save** on the right top of the page.
   The settings implemented in the 'Application Settings' page are default applied for all the newly created quotes.

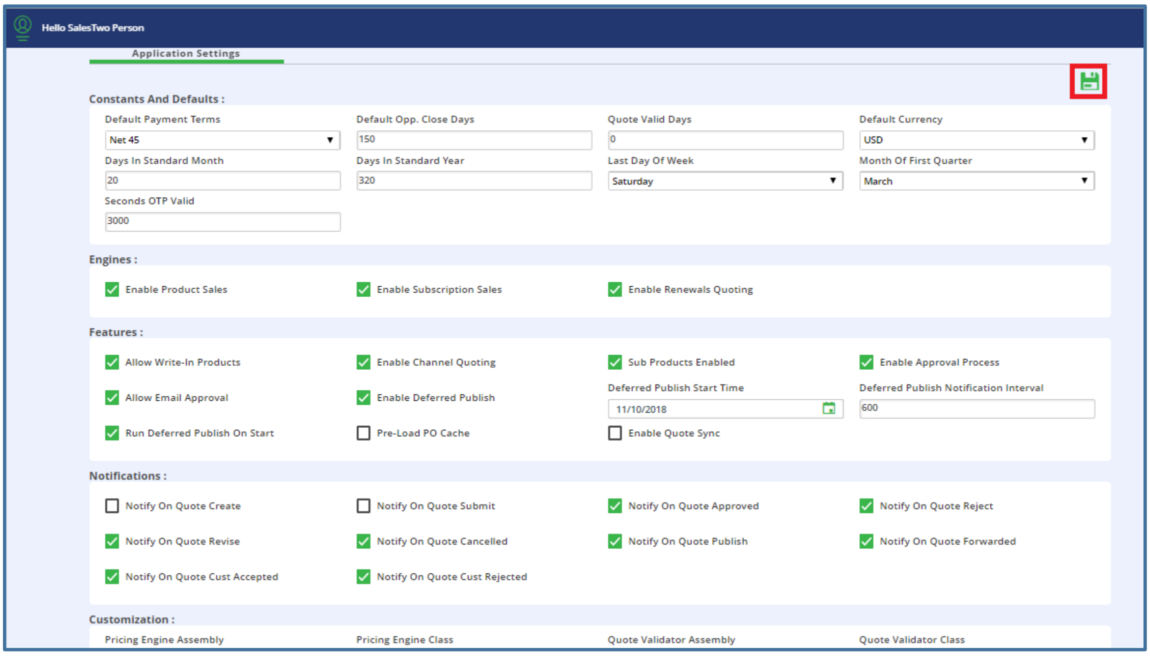

Figure 89: Application Settings

➢ The following are the default terms Admin can be set for the creation of quotes under **Constants and Defaults**:
- Select **Default Payment Terms** from the drop-down
- Enter the number of **Default Opp. Close Days**
- Enter the number of **Quote Valid Days**
- Select **Default Currency** from the drop-down
- Enter the number of **Days in Standard Month**
- Enter the number of **Days in Standard Year**
- Select the **Last Day Of Week**

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- Select the **Month Of First Quarter** from the drop-down
- Enter the time in **Seconds OTP Valid**

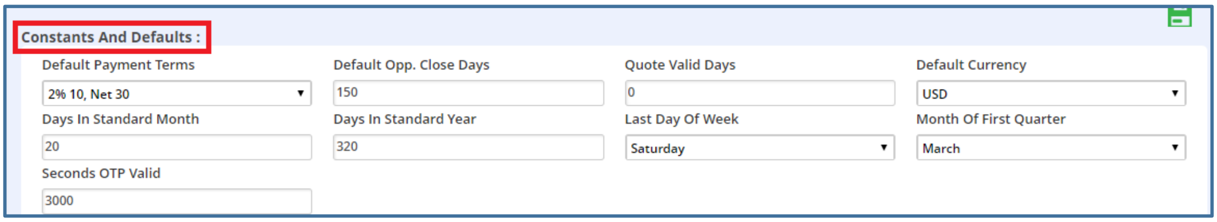

Figure 90: Constants and Defaults

➢ The following are the default terms Admin can be set for the creation of quotes under **Engines:**
- Select the checkbox for **Enable Product Sales** to enable the customer to sell a product for a quote.
- Select the checkbox for **Enable Subscription Sales** to enable the customer to subscribe to a quote for the product.
- Select the checkbox for **Enable Renewals Quoting** to enable the customer for renewal of quote for the product.

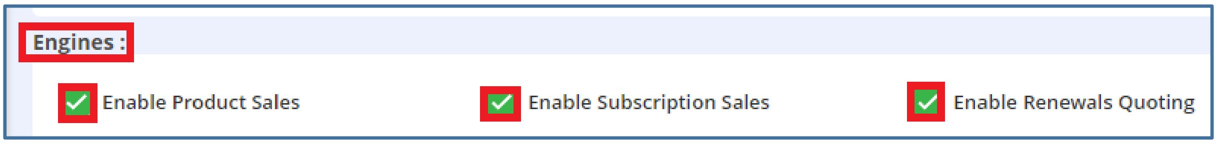

Figure 91: Engines

➢ The following are the default terms Admin can be set for the creation of quotes under **Features.** The terms under 'Features' enables the sales manager/sales user to access and edit the **Quote Line Items** in the 'Quote General Information page'**.**
- Select the checkbox for **Allow Write-in Products** to allow the user to edit Allow Write-in Products
- Select the checkbox for **Enable Channel Quoting**
- Select the checkbox for **Sub Products Enabled**
- Select the checkbox for **Enable Approval Process**
- Select the checkbox for **Allow Email Approval**
- Select the checkbox for **Enable Deferred Publish**
- Select the date for **Deferred Publish Start Date**
- Enter the time for **Deferred Publish Notification Interval**
- Select the checkbox for **Run Deferred Publish on Start**
- Select the checkbox for **Pre-Load PO Cache**
- Select the checkbox for **Enable Quote Sync**

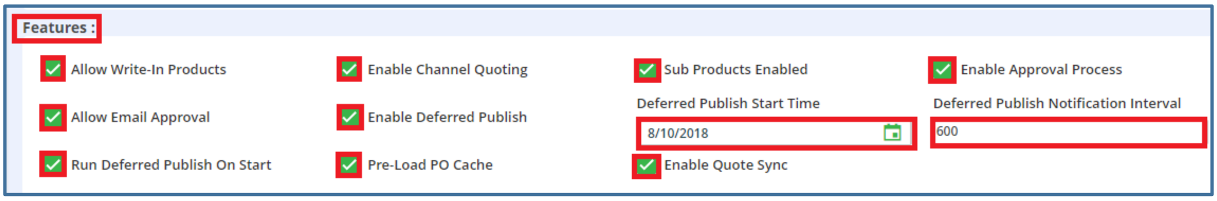

Figure 92: Features

- The following are the default terms Admin can be set for the creation of quotes under **Notifications.** The terms under 'Notification' enables the admin to notify the customers and sales team to receive the notification mail at different stages of quote related activities.
  - Select the checkbox for **Notify On Quote Create** to notify sales team on new quote creation.
  - Select the checkbox for **Notify On Quote Submit** to notify sales team on the submission of a quote for approval.
  - Select the checkbox for **Notify On Quote Approved** to notify sales team on the approval of a quote.
  - Select the checkbox for **Notify On Quote Reject** to notify sales team on the rejection of a quote.
  - Select the checkbox for **Notify On Quote Revise** to notify sales team on the revision of a quote.
  - Select the checkbox for **Notify On Quote Cancelled** to notify sales team on cancellation of a quote.
  - Select the checkbox for **Notify On Quote Publish** to notify sales team on the publishing of a quote.
  - Select the checkbox for **Notify On Quote Forwarded** to notify sales team on forwarding of the quote to a customer.
  - Select the checkbox for **Notify On Quote Cust Accepted** to notify sales team on the accepting a quote by the customer.
  - Select the checkbox for **Notify On Quote Cust Rejected** to notify sales team on the rejection of a quote by the customer.

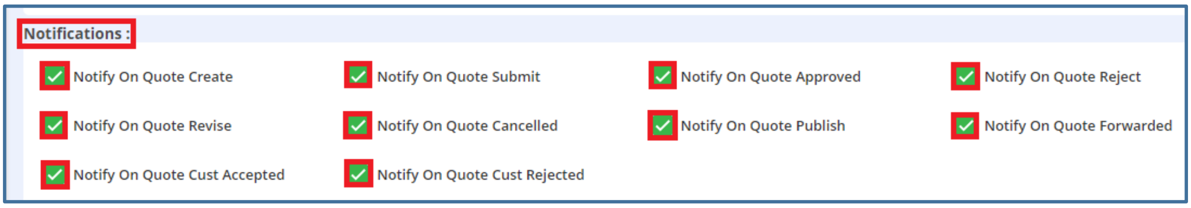

Figure 93: Notifications

- The following are the default terms Admin can be set for the creation of quotes under **Customization.**
  - The **Pricing Engine Assembly** allows the sales team to set different pricing list for a product on a different geographical area across the world. This pricing list implementation is done by the Positiveedge Technologies and is shared with the sales team.
  - The **Pricing Engine Class** contains the various Pricing Engine Assembly.

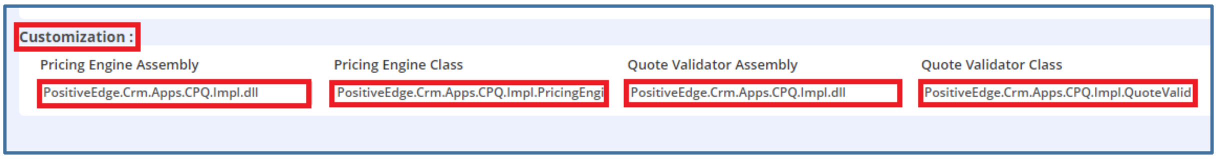

Figure 94: Customization

6.4. Edit Price List for a Product

The price list page displays all the pricelists for a product along with their line items, as is required for quote creation.

1. Click **Price Lists** tab from the left side of the dashboard page.
   The 'Price List' page appears which displays the list of existing prices and 'Is Active' status for a product.
   - Click **Filter** to filter the price list by Name, Currency, Valid From and Valid To date, and Is Active status.
   - Click **Refresh** to update the CRM entries in Quotedge.

Figure 95: Price Lists Page

3. Click **Add row** to add a new price list.
   The 'Add Row' dialogue box appears.

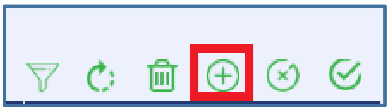

Figure 96: Click Add Row

4. Enter the Price List Name, Select the currency from the drop-down list, select 'Valid From' date and 'Valid To' date and then click **Save**.
   The new price list is created.

positiveedge

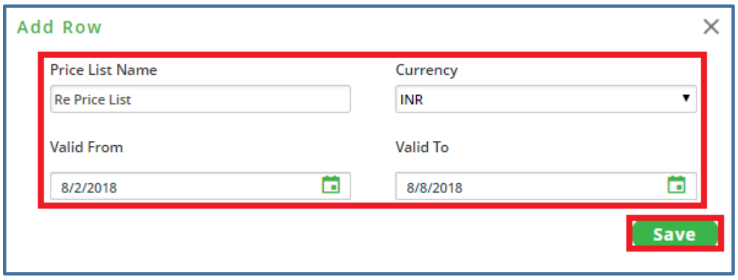

Figure 97: Add Row Page

➢ The new price list 'Re Price List' created in the price lists page is shown below.

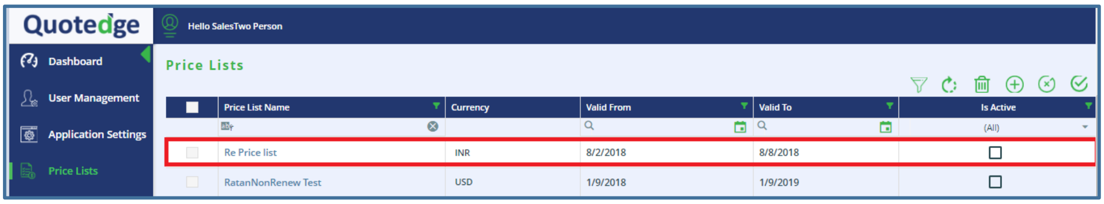

Figure 98: Price Lists

5. Select the checkbox for the price list name from the list to perform the following action:
    - Click **Delete** to delete the price list from the list.
    - Click **Deactivate** to deactivate the price list to edit.
    - Click **Activate** to activate the price list after editing.

Figure 99: Price Lists

6. Click the Price List Name from the list to edit an existing price list of a product. The 'Pricing and Product Configuration' dialogue box appears.

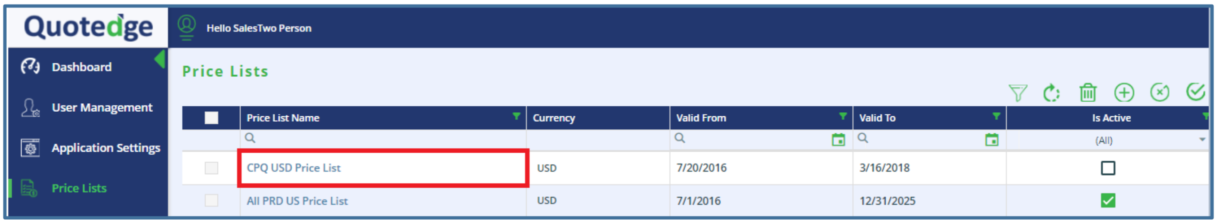

Figure 100: Select the Price List Name

7. Enter the field details to edit the price list.
    - Edit the price list name
    - Select the currency from the dropdown
    - Select the Created on Date
    - Select the Valid from Date
    - Select the Valid to Date

Notes:

- The user can change or add further details to the existing price list line items only if the **'Is Active'** checklist is not selected.
- If the **'Is Active'** checklist is selected click the **'Deactivate'** to make the changes.
- Once done with the changes, the price list can again be **'Activated'** by clicking.

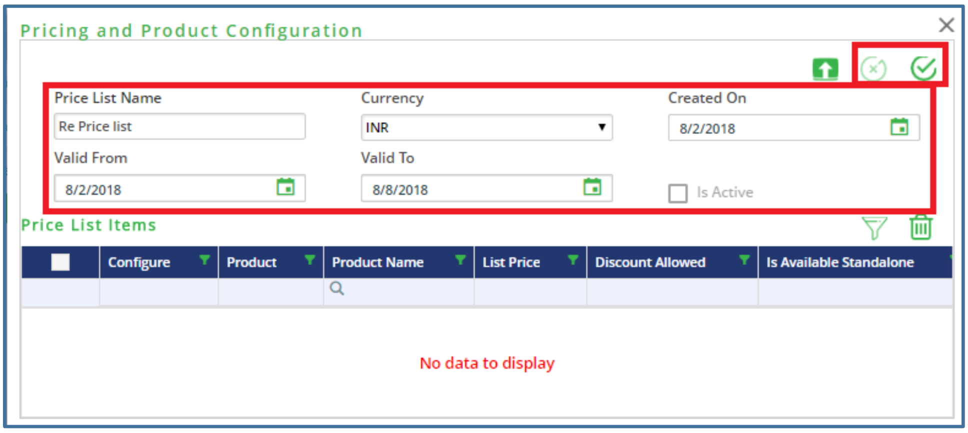

Figure 101: Pricing and Product Configuration

6.5. Create a Rule, Validate the Rule and Apply Conditions for Rule

The Admin sets the rule for a quote, validate the rule and applies the condition for validation. The rules created are applied to the newly created quotes.

Create a Rule:

1. Click **Rules** tab on the left side of the dashboard page.
   The ‘Rules Configuration’ page appears which displays the list of rules created for quotes.

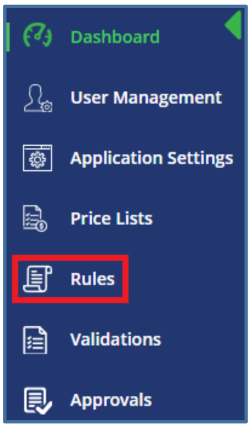

Figure 102: Click Rules

2. Click  (**Create New**) icon on the top right of the page.
   The New Rule **[New]** is created in ‘Rules Configuration’ page.

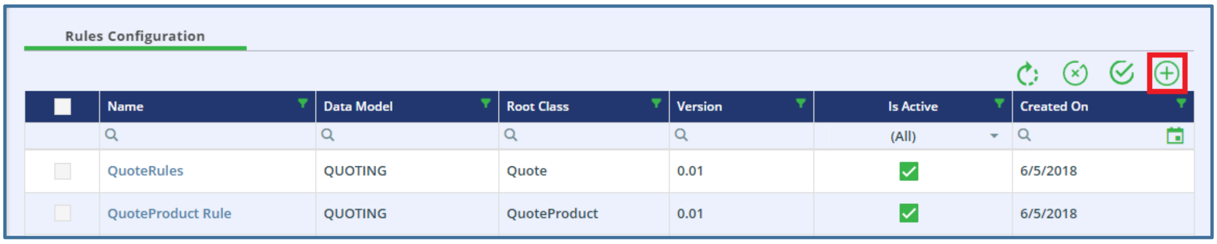

Figure 103: Rules Configuration

3. Click **[New]** from the list to edit the rule.
   The ‘Rules Set Configuration’ dialogue-box appears.

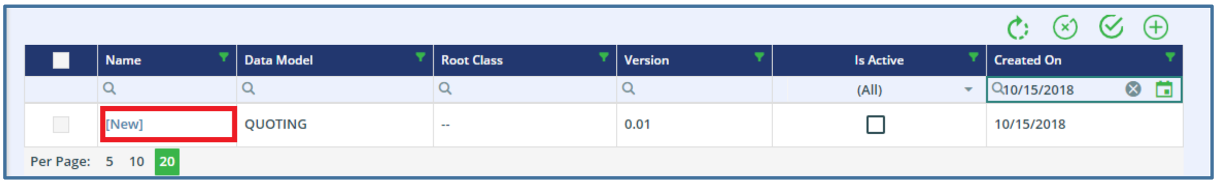

Figure 104: Click on the Rule Name

4. Enter the **Name** for the rule, enter the **Version** number for the rule, enter the **Root Class** for the rule and then click **Close.**
   The rule name is updated under Rules Configuration page.

Figure 105: Rule Set Configuration

➢ The updated Rule name **rule 1** under configuration page is shown below.

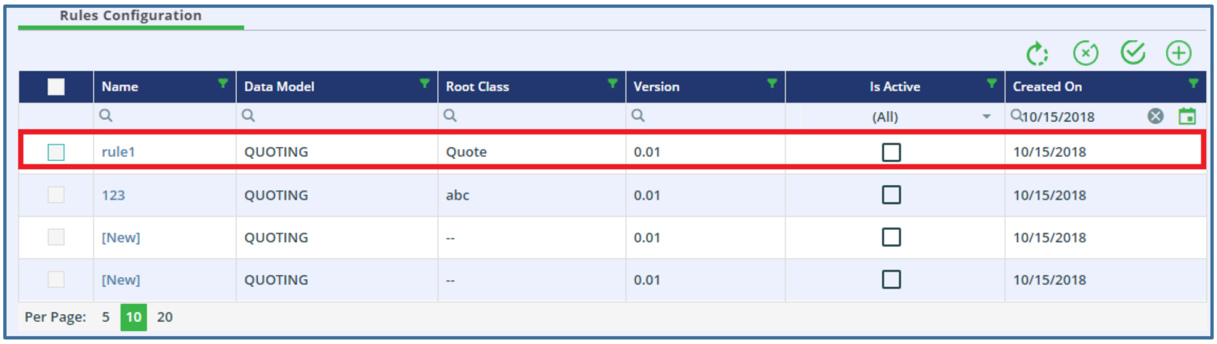

Figure 106: Rules Configuration

Validate the Rule:

1. Click **Validations** tab on the left side of the dashboard page.
   The 'Validation Rules' page appears which displays the list of validations for a rule.

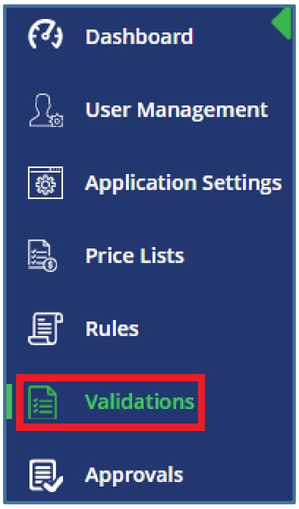

Figure 107: Click Validation

2. Click (**Add Row**) to create a new validation for a rule.
   The ‘Add Row’ dialogue box appears.

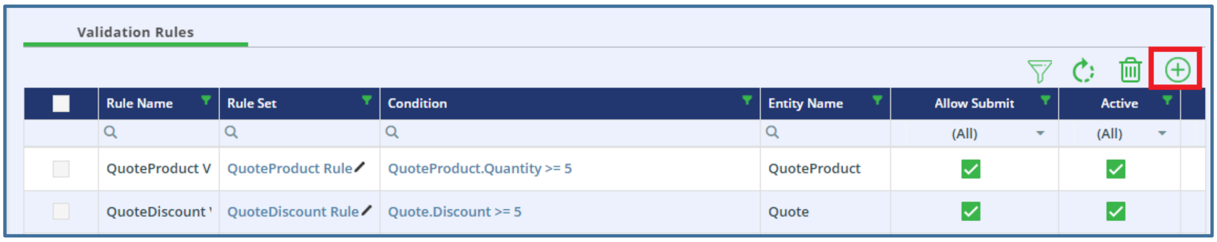

Figure 108: Validation Rules

3. Enter the field details and then click **Save**.
   The new Validation is added for the list under Validation Rules.

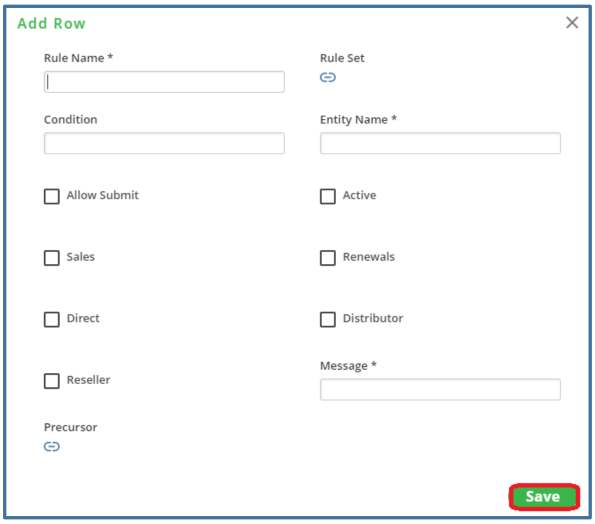

Figure 109: Add Row

➢ **The field details to fill under ‘Add Row’ are:**
   - Enter the **Rule Name**
   - Click (**Rule Set**) icon to select the rule from rules list.
     The ‘Rule Set’ dialogue box appears.
     <u>Note</u>: All the rules which are listed under ‘Rules Configuration’ page and are in ‘De-active’ status are displayed on the ‘Rule Set’ dialogue-box.
     - Select the Rule name from the list and then click **Save**.

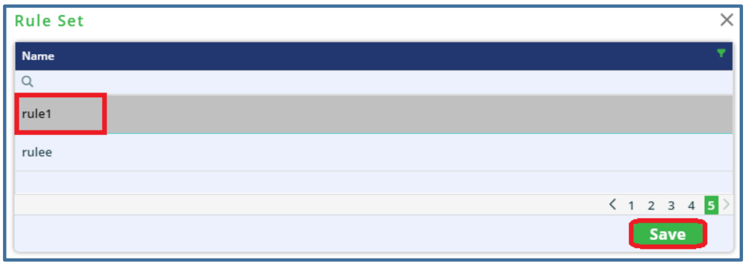

Figure 110: Rule Set

- The selected Rule Name is set under Rule Set as 

- Enter the **Entity Name**
- Select the Checkbox for **Sales**
- Select the Checkbox for **Remarks**
- Select the checkbox for **Direct**
- Select the Checkbox for **Distributor**
- Select the Checkbox for **Reseller**
- Enter the **Message**

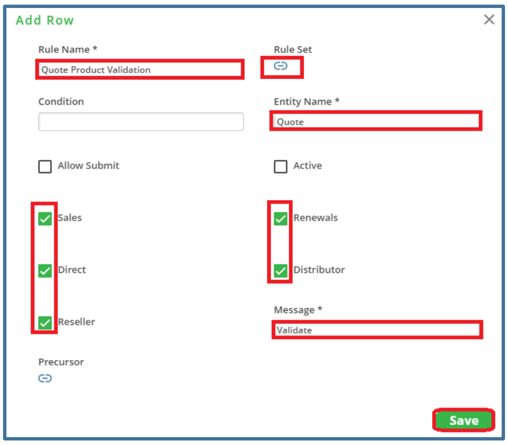

Figure 111: Add Row

<u>Apply Condition for the Rule:</u>

1. The new Validation added to the ‘Rule Name’ list is shown below, under Condition tab click **[New].**
   The ‘Condition Editor’ dialogue-box appears.

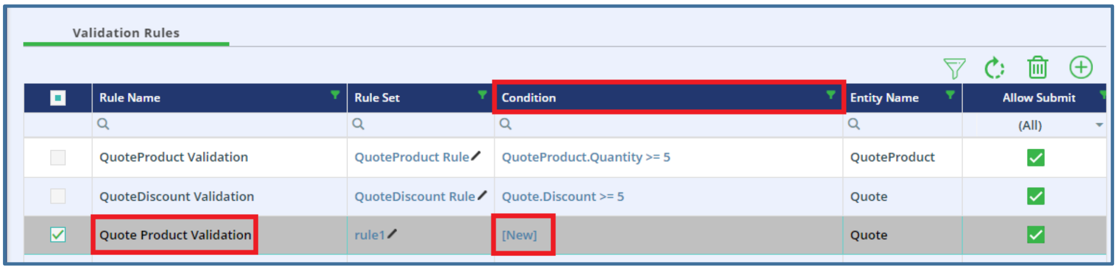

Figure 112: Validation Rules list

2. Click  (**Add row**) to define a condition.
   The ‘Add Row’ dialogue box appears.

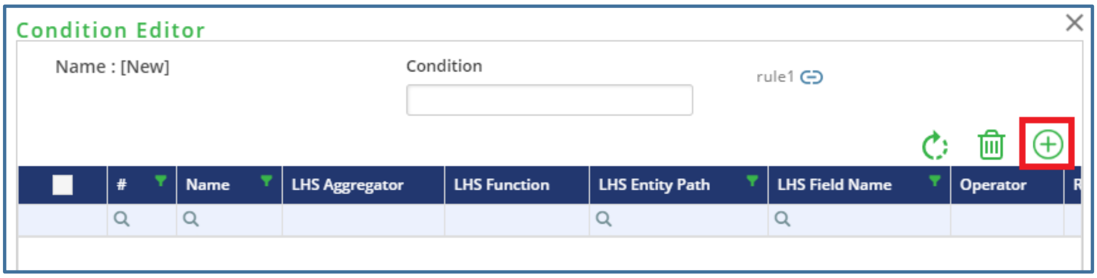

Figure 113: Condition Editor

3. Enter the mandatory field details and then click **Save**.
   The Mandatory field details to fill are:
   - Enter the **LHS Entity Path**
   - Enter the **LHS Field Name**
   - Select the **Operator** from the drop-down
   - Enter a **Value** for the condition

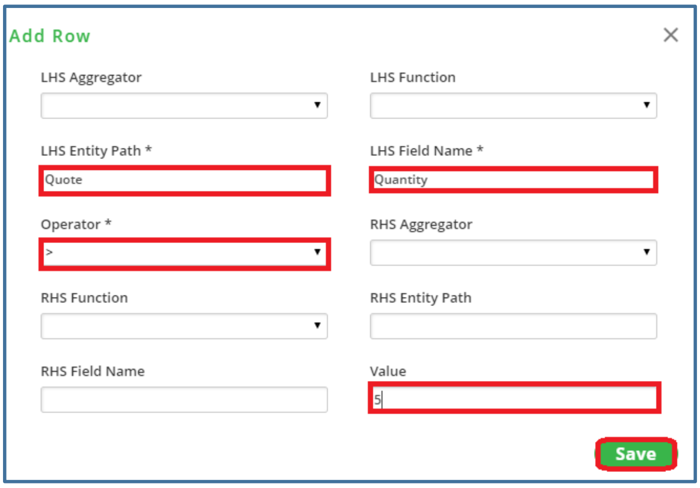

Figure 114: Add Row

➢ The newly applied condition is displayed in ‘Name’ list under Condition Editor.

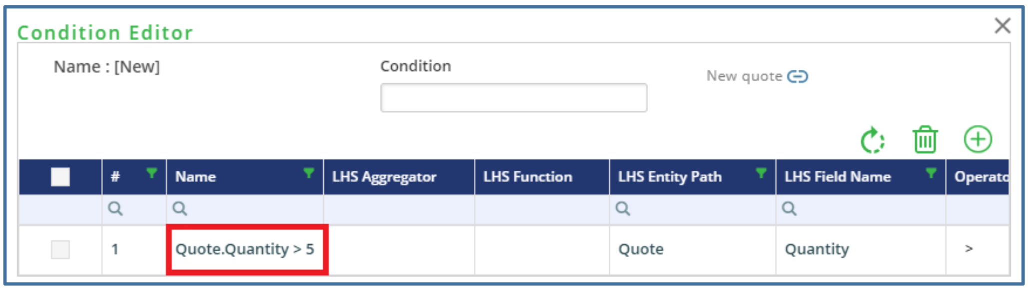

Figure 115: Condition List under Condition Editor

4. Under **Condition** field, enter the condition Name list number within flower brackets.
   Note: {1} in the below image.
   The Name changes as same as the Condition name.

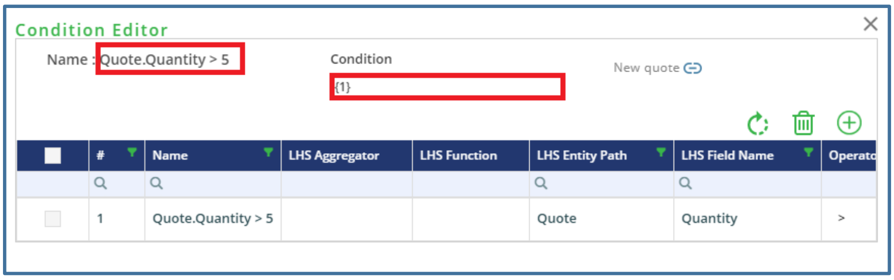

Figure 116: Condition Name

5. The Condition for the validation rule updates in the 'Validation Rules' page.

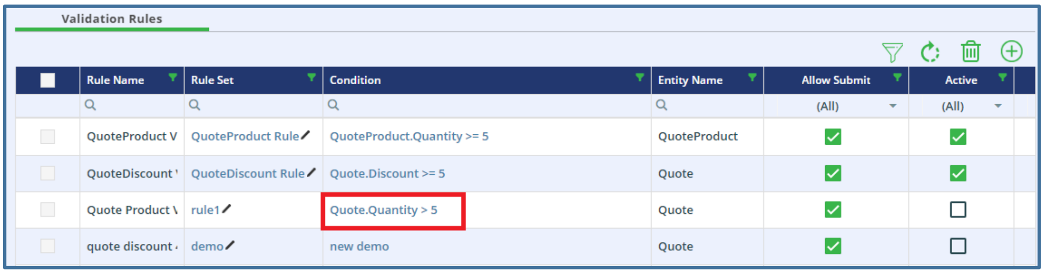

Figure 117: Validation Rules

6.6. Assign Approver and Set Role for the Approver

The Admin adds approver for the quote and assigns roles for the approver.

1. Click the **Approvals** tab on the left side of the dashboard page.
   The 'Approvals' page appears which displays the list of 'Approval Process Names'.

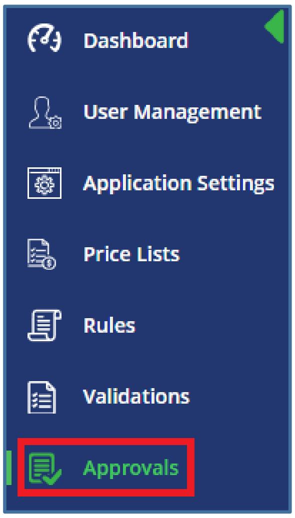

Figure 118: Click Approvals

2. Click (**Add New**) to create a new approver.
   The New Approval Process Name **[New]** is added in Approvals page.

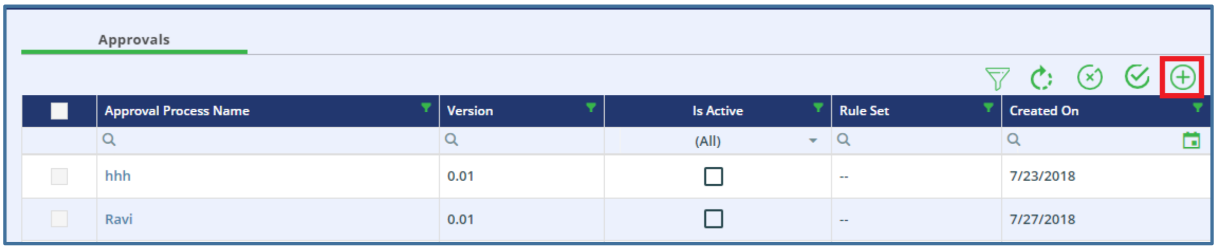

Figure 119: Approvals

3. Click the **[New]** from the list to assign roles.
   The 'Approval Workflow' Configuration dialogue-box appears.

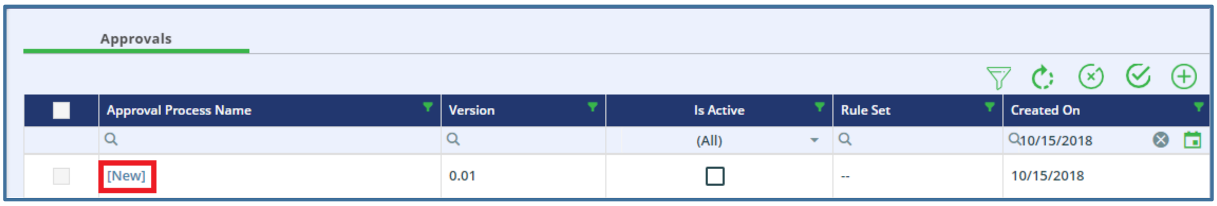

Figure 120: Approvals

➢ The **Approval Workflow Configuration** dialogue-box is shown below enter the following field information.

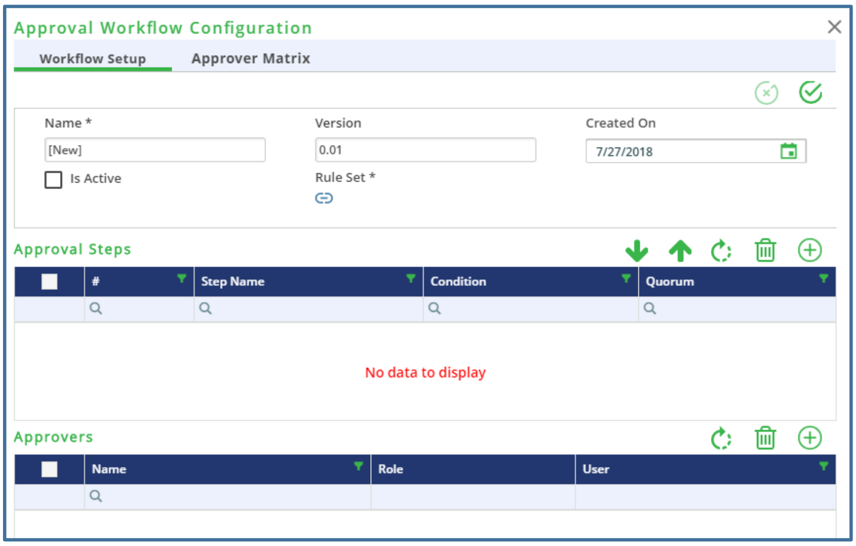

Figure 121: Approval Workflow Configuration

1. Enter the **Rule** name.

2. Under ‘Approval Steps’ Click (**Add row**).
   The ‘Add Row’ dialogue-box appears.

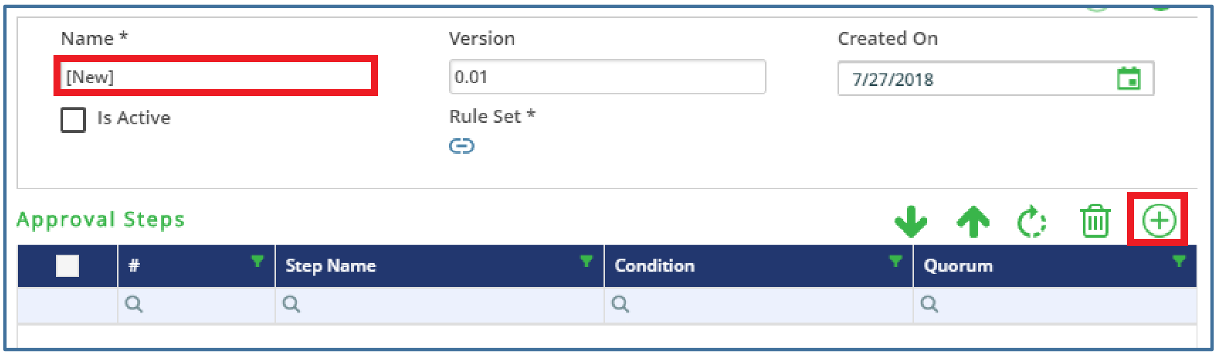

Figure 122: Approval Steps

- Enter the **Step Name**, enter the **Quorum** quantity, and then click **Save**.
  The ‘Step Name’ list is added under Approval Steps section.

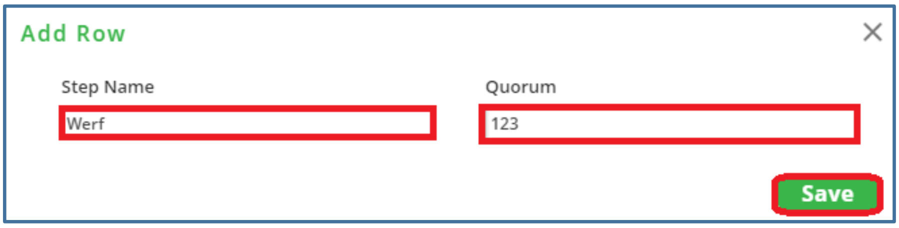

Figure 123: Add Row

- Under the ‘Condition’ tab click **[New]** in Approval Steps section to apply the condition.
  The ‘Condition Editor’ dialogue-box appears.

Figure 124: Approval Steps

- Click (**Add row**) to define a new condition.
  The ‘Add Row’ dialogue-box appears.

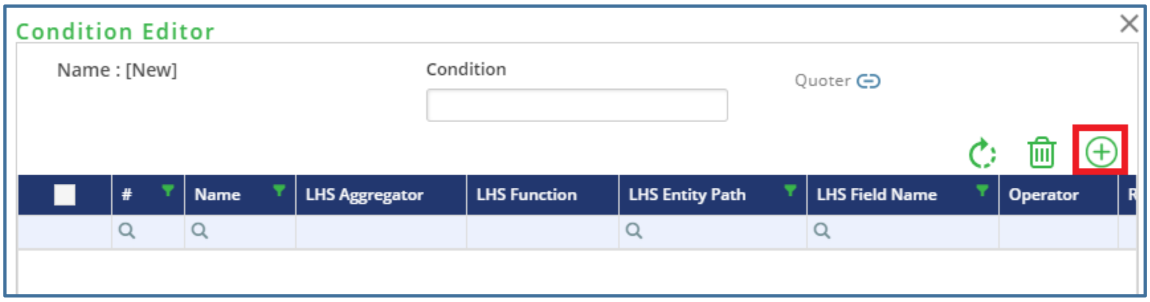

Figure 125: Condition Editor

- Enter the mandatory field details and then click **Save**.
  The Mandatory field details to fill are:
  - Enter the **LHS Entity Path**
  - Enter the **LHS Field Name**
  - Select the **Operator** from the drop-down
  - Enter the **Value** for a condition

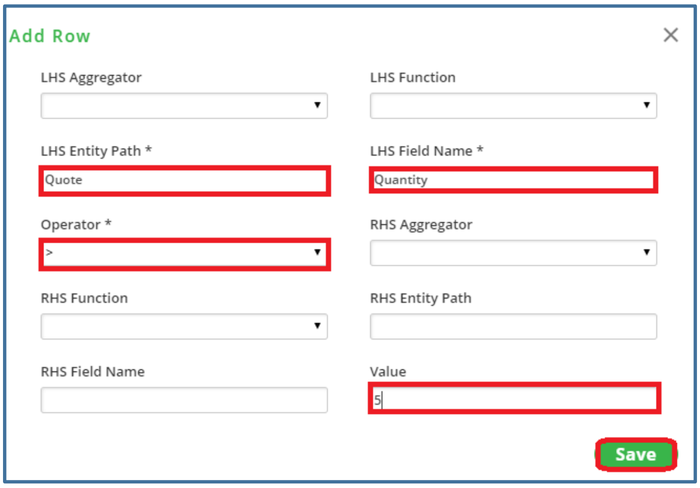

Figure 126: Add Row

- Under Condition field, enter the condition list number within flower brackets.
  Note: {1} in the below image.
  The 'Name' changes as same as the Condition name from the list.

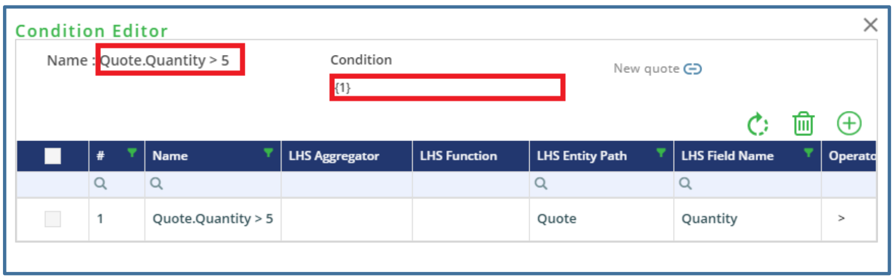

Figure 127: Condition Name

- The Condition under Approval Steps updates in Approval Workflow Configuration.

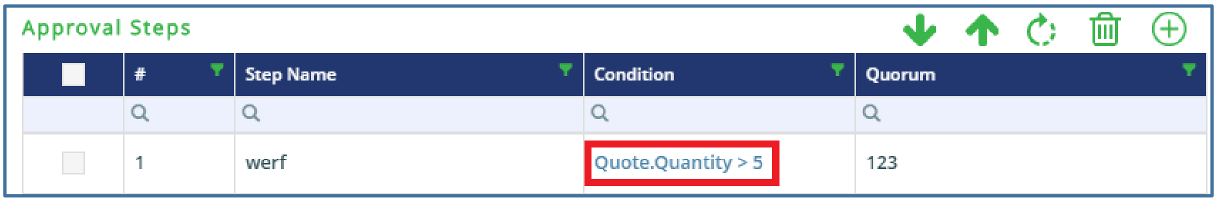

Figure 128: Approval Steps

3. Under ‘Approvers’ section Click (**Add row**) to add name and Roles for the approver. The ‘Add Row’ dialogue box appears.

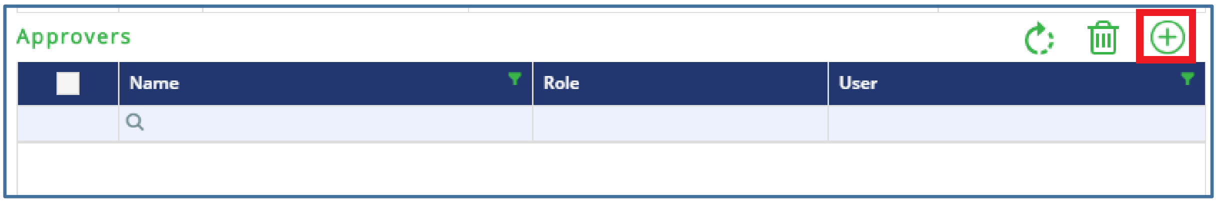

Figure 129: Approvers

4. Enter the **Name** of the approver, select the **Role** from the drop-down and then click **Save**.

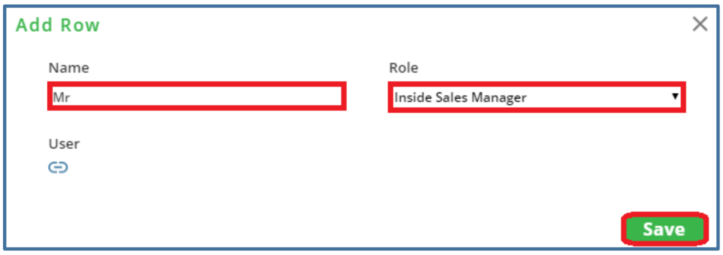

Figure 130: Add Row

5. The Name and Role of the approver is updated under the ‘Approvers’ section

7. Glossary

Term	Description or Definition
CRM	Customer Relationship Management
URL	Uniform Resource Locater
MS	Microsoft
CPQ	Quoting, Pricing and Configuration