

User Manual

Quotedge User Manual

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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.

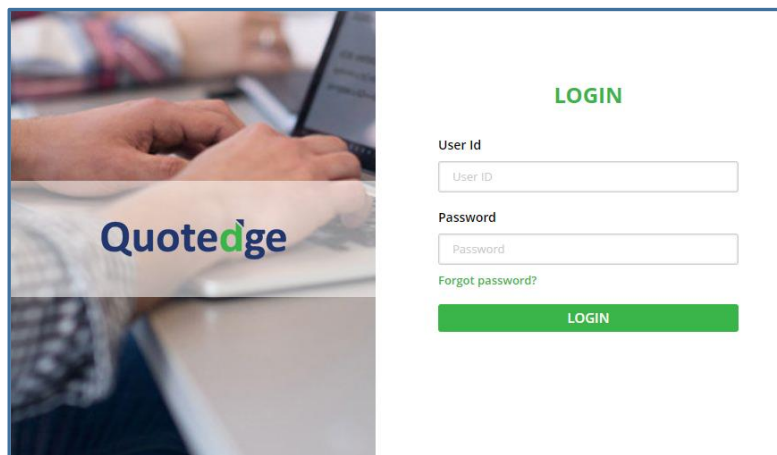


Figure 1: Login Page

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

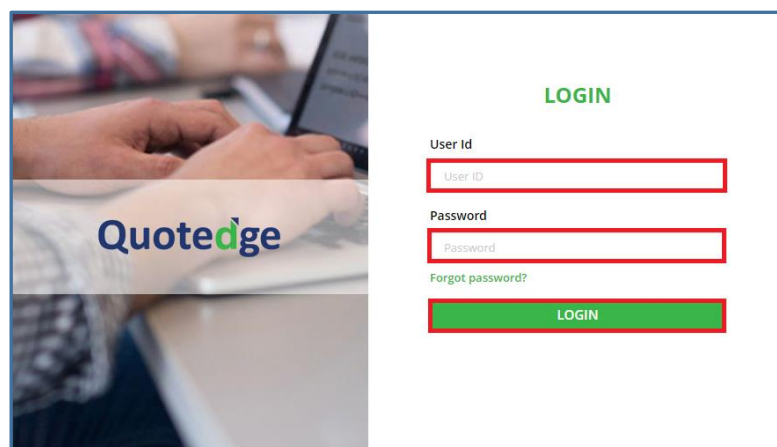


Figure 2: Login Page

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.

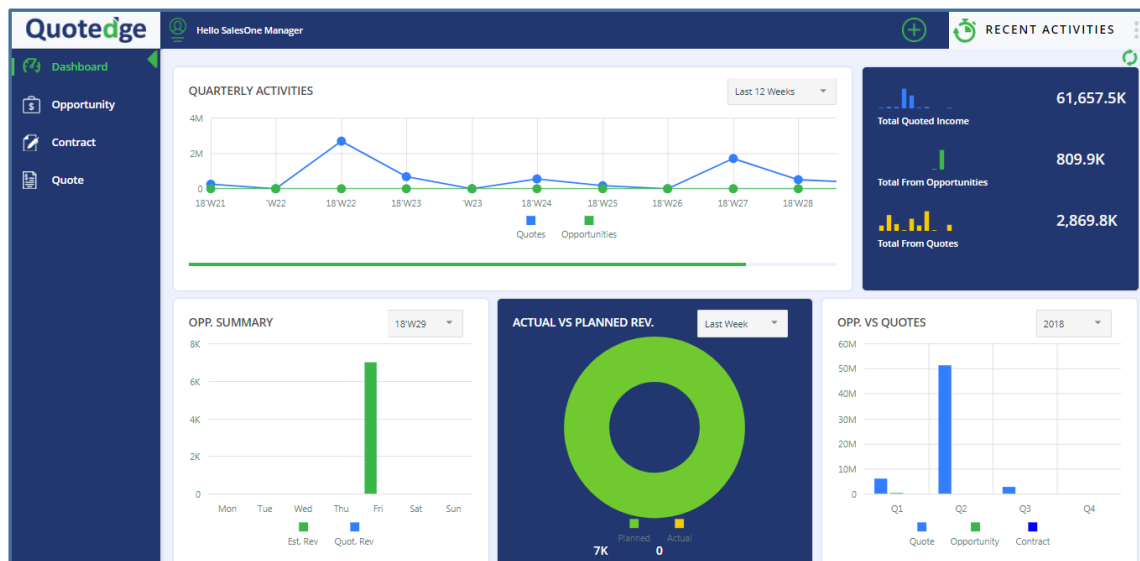


Figure 3: The Quotedge Dashboard Page

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.

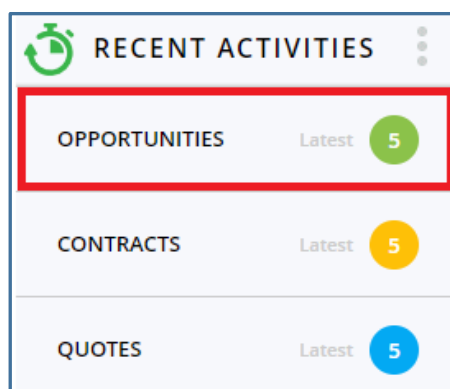


Figure 5: Click Opportunities

3. Click on any of the opportunity from the list.

The user will be navigated to the 'Opportunities General Information page'.

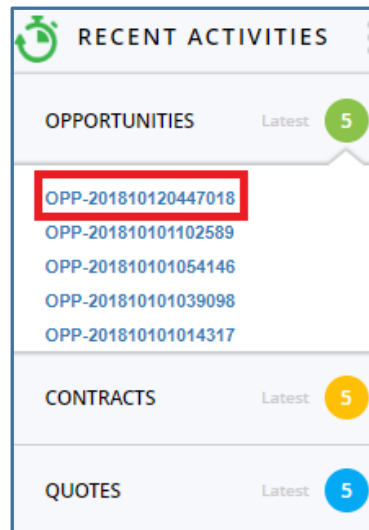


Figure 6: Opportunities list

4. Click on the **Contracts** tab to view the recent activities.

The list of recently created five Contracts are displayed.

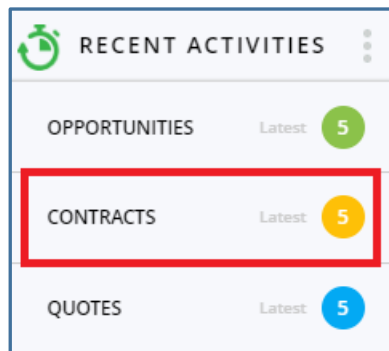


Figure 7: Click Contracts

5. Click on any of the Contract from the list.

The user will be navigated to the 'Contracts General Information page'.

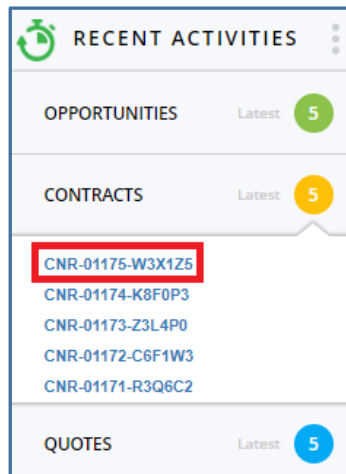


Figure 8: List of Contracts

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

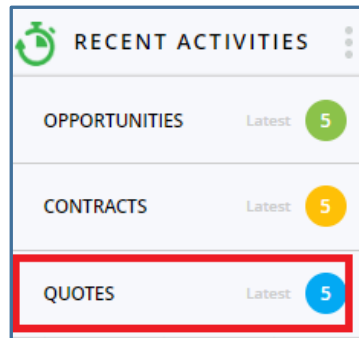


Figure 9: Click Quote

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

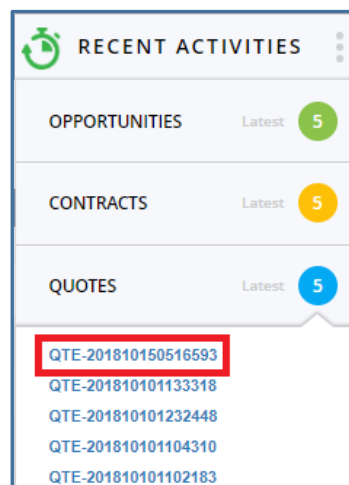



Figure 10: List of Quotes

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.

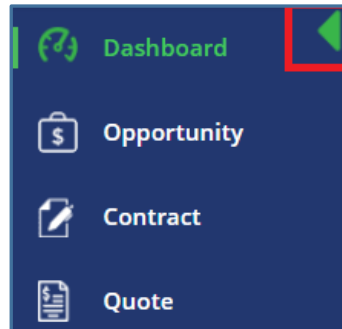


Figure 11: Click Arrow icon

- 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.

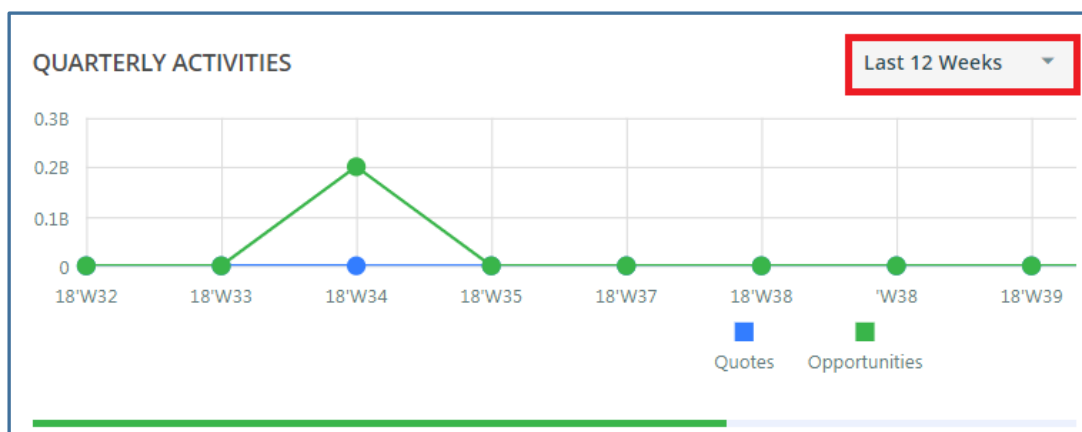


Figure 13: Quarterly Activities Graph

- 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.

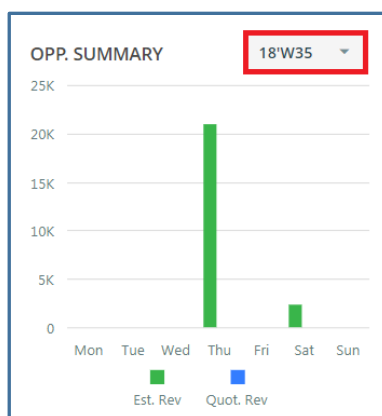


Figure 15: Opportunity Summary Graph

- 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.

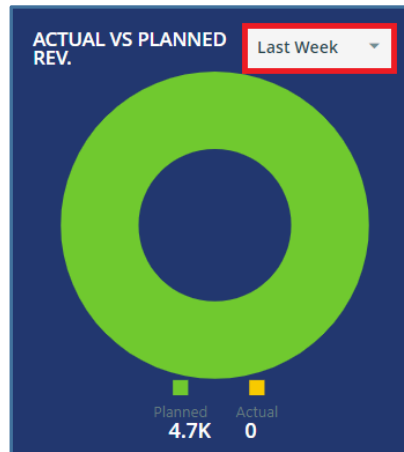


Figure 16: Actual Vs Planned Revenue amount

- 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.

<div> <div>OPPORTUNITIES</div> <div>CONTRACTS</div> <div>QUOTES</div> </div> <div> <div>Refresh</div> <div>Export</div> <div>Search...</div> </div>									
<input type="checkbox"/>	Name	Created On	Customer Name	Est. Close Date	Est. Revenue	Opportunity Type	Price List	Close Probability	
<input type="checkbox"/>	OPP-201810101102589	10/10/2018	ACC-201809111147237	3/10/2019	\$100.00	Renewal		0%	
<input type="checkbox"/>	OPP-201810101039098	10/10/2018	ACC-201809111147237	3/10/2019	\$100.00	Renewal		0%	



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.

<div> <div>Refresh</div> <div>Export</div> <div>Search...</div> </div>									
<input type="checkbox"/>	Name	Created On	Customer Name	Est. Close Date	Est. Revenue	Opportunity Type	Price List	Close Probability	Rating
<input checked="" type="checkbox"/>	OPP-201810120447018	10/12/2018	ACC-201809111147237	3/12/2019	\$100.00	Renewal		0%	Warm
<input type="checkbox"/>	OPP-201810101054146	10/10/2018	ACC-201809111147237	3/10/2019	\$100.00	Renewal		0%	Warm

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.

☒ Select All

☒ OPP-201810090515231

☒ OPP-201810101006582

☒ OPP-201810101007349

☒ OPP-201810101011324

☒ OPP-201810101012370

OK
 Cancel

Figure 20: Select All

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

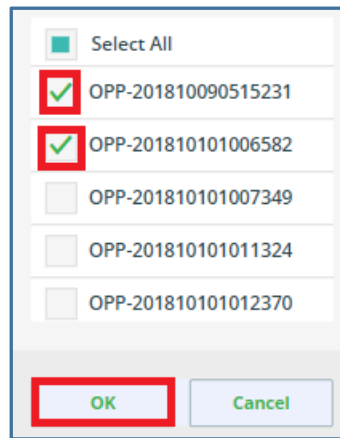




Figure 21: Select the Item

- Click the  (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**

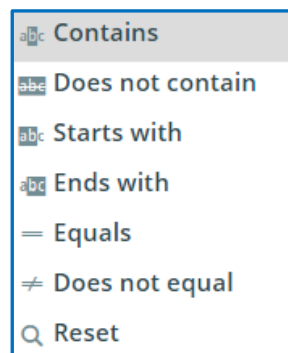


Figure 22: Local Search Filters

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**

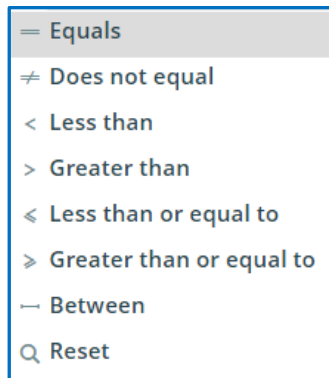



Figure 23: Local Search Filters

- 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.

CREATE QUOTE

Select Opportunity

Name	Customer
Accenture	Neymar
Agenor Technology	Neymar
Airtricity	Neymar
Baltimore Technologies	Alpine Ski House (sample)
Bank Pekao	Alpine Ski House (sample)

Select Price list

Name	Currency	Applicable From	Applicable To
PLNEW_NR	USD	Apr 01 2018	Apr 02 2019
PLNonRenew	USD	Jul 12 2017	Jul 12 2022
PLRenew	USD	Jul 12 2017	Jul 12 2022
PRC-201809111133522	USD	Sep 12 2018	Oct 12 2018
PRC-201809111147237	USD	Sep 12 2018	Oct 12 2018

Set Quote Key Information

Payment Term

Channel Type

Currency

☒ Is Primary

Net 45

Reseller


USD

Create

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

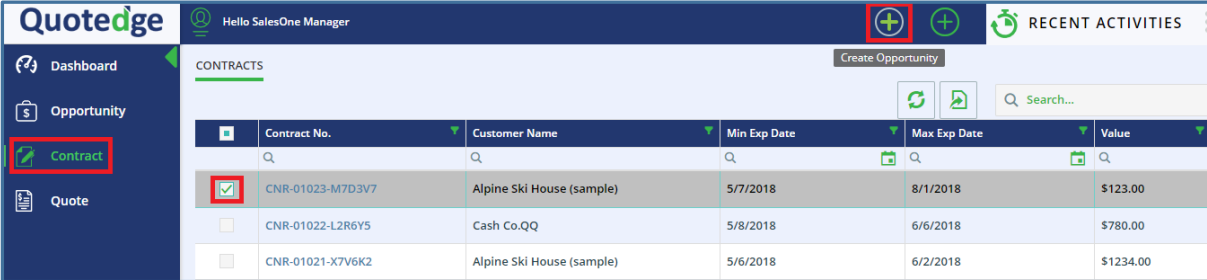
- Click the  (**Logout**) icon on the top left of the page to log out of the Quotedge application.

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.



	Contract No.	Customer Name	Min Exp Date	Max Exp Date	Value
<input checked="" type="checkbox"/>	CNR-01023-M7D3V7	Alpine Ski House (sample)	5/7/2018	8/1/2018	\$123.00
<input type="checkbox"/>	CNR-01022-L2R6Y5	Cash Co.QQ	5/8/2018	6/6/2018	\$780.00
<input type="checkbox"/>	CNR-01021-X7V6K2	Alpine Ski House (sample)	5/6/2018	6/2/2018	\$1234.00

Figure 26: Click Create Opportunity

- Click **Ok**.

The 'General Information' page of the opportunity appears.

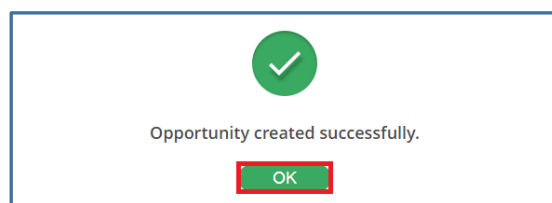
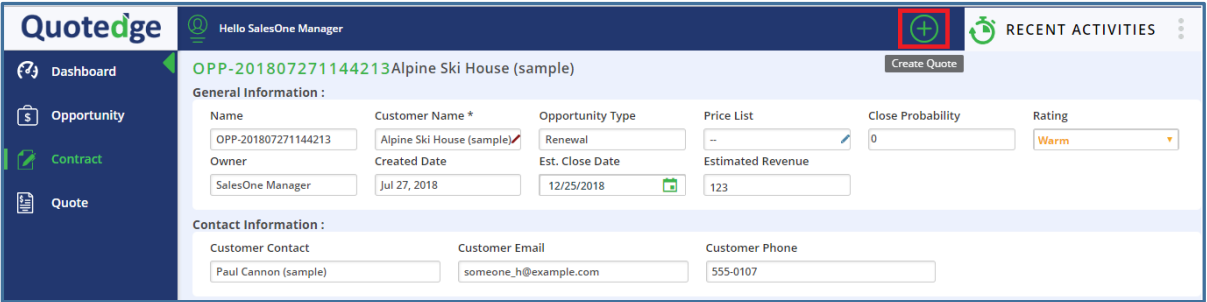


Figure 27: 'Opportunity created successfully' message

- Click **Create Quote** on the right top of the page.

The 'Create Quote' dialogue box appears.



General Information :

Name	Customer Name *	Opportunity Type	Price List	Close Probability	Rating
OPP-201807271144213	Alpine Ski House (sample)	Renewal	--	0	Warm
Owner	Created Date	Est. Close Date	Estimated Revenue		
SalesOne Manager	Jul 27, 2018	12/25/2018	123		

Contact Information :

Customer Contact	Customer Email	Customer Phone
Paul Cannon (sample)	someone_h@example.com	555-0107

Figure 28: Create a Quote

- 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.

CREATE QUOTE

Select Price list

Name	Currency	Applicable From	Applicable To
All PRD US Price List	USD	Jul 01 2016	Dec 31 2025
PLNEW_NR	USD	Apr 01 2018	Apr 02 2019
PLNonRenew	USD	Jul 12 2017	Jul 12 2022
PLRenew	USD	Jul 12 2017	Jul 12 2022
RatanRenew	USD	Jan 09 2018	Jan 09 2019

Set Quote Key Information

Payment Term

Channel Type

Currency

Is Primary

Net 30

Reseller

USD

Create

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.

Quotedge

Hello SalesOne Manager

QUOTE TITLE : Alpine Ski House (sample)

RECENT ACTIVITIES

Dashboard

Opportunity

Contract

Quote

General Information

Customer Information

Ship To Address

Bill To Address

Channel Information

Line Items

Quote Number

Revision Number

Quote Type

Channel

Opportunity

Status

Price List

Currency

Created By

Created Date

Exp. Date

Quote Total

Quote Discount

Net Total

Payment Term

Is Primary

Customer Name *

Customer Contact *

Customer Email

Customer Phone

Ship To Address

Address: Street 1

Address: Street 2

Address: City

Address: Postal Code

Address: Country

Bill To Address

Address: Street 1

Address: Street 2

Address: City

Address: Postal Code

Address: Country

Channel Information

Reseller Name *

Reseller Contact *

Reseller Email

Reseller Phone

Line Items

Revisions

S.Number

Item Columns

Configure

Product

Product Name

Asset

Asset Ser #

List Price

Markup %

Price

Quantity

Item Size

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.

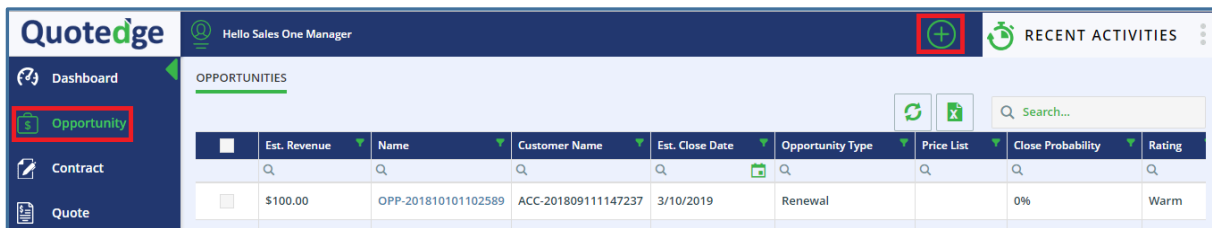


Figure 31: Click Opportunity

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.



Quote No.	Customer Name	Revision	Quote Amount	Cust. Contact	Quote Type	Status
QTE-201807270913031	Cristiano Ronaldo	0	\$100.00	Zuck Erik	Renewal	Draft
QTE-201807100629494	Lionel Messi	1	\$275.90	Lionel	Sales	Approved

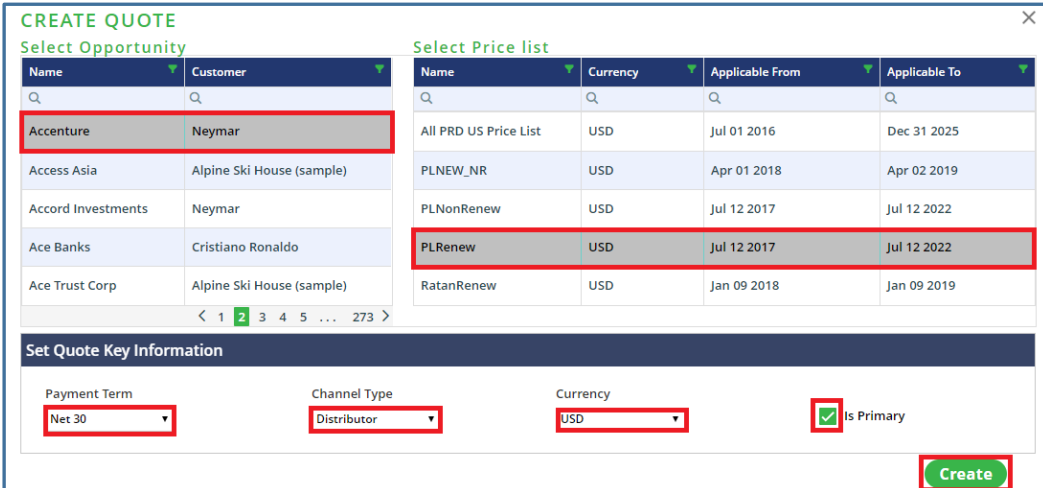
Figure 33: Create a Quote

- 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.



Name	Customer
Accenture	Neymar
Access Asia	Alpine Ski House (sample)
Accord Investments	Neymar
Ace Banks	Cristiano Ronaldo
Ace Trust Corp	Alpine Ski House (sample)

Name	Currency	Applicable From	Applicable To
All PRD US Price List	USD	Jul 01 2016	Dec 31 2025
PLNEW_NR	USD	Apr 01 2018	Apr 02 2019
PLNonRenew	USD	Jul 12 2017	Jul 12 2022
PLRenew	USD	Jul 12 2017	Jul 12 2022
RatanRenew	USD	Jan 09 2018	Jan 09 2019

Set Quote Key Information

Payment Term: Net 30 | Channel Type: Distributor | Currency: USD | ☒ Is Primary

Create

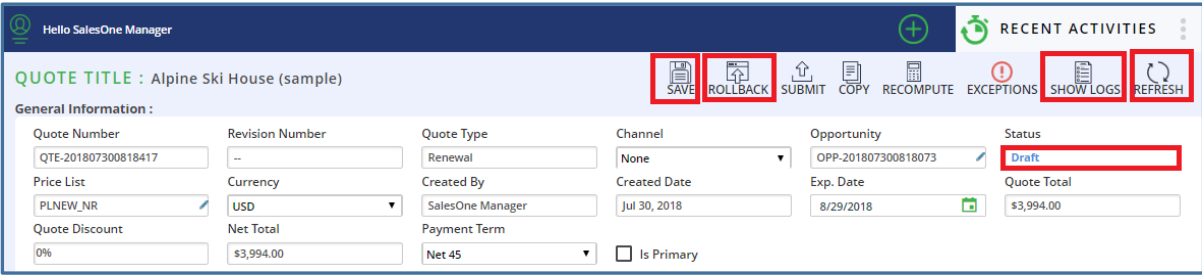
Figure 34: Create New Quote Page

- 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.



Hello SalesOne Manager

QUOTE TITLE : Alpine Ski House (sample)

RECENT ACTIVITIES

General Information:

Quote Number QTE-201807300818417	Revision Number --	Quote Type Renewal	Channel None	Opportunity OPP-201807300818073	Status Draft
Price List PLNEW_NR	Currency USD	Created By SalesOne Manager	Created Date Jul 30, 2018	Exp. Date 8/29/2018	Quote Total \$3,994.00
Quote Discount 0%	Net Total \$3,994.00	Payment Term Net 45	<input type="checkbox"/> Is Primary		

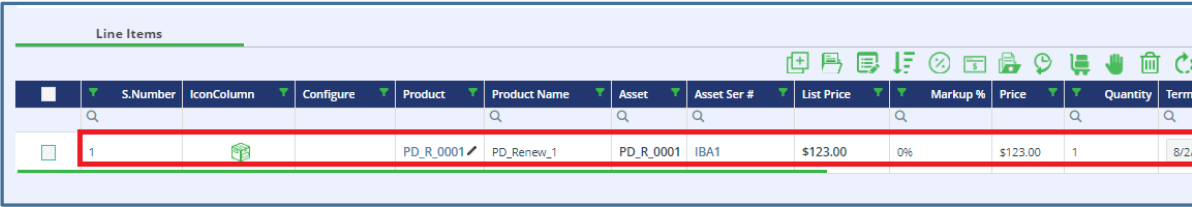
SAVE ROLLBACK SUBMIT COPY RECOMPUTE EXCEPTIONS SHOW LOGS REFRESH

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.




S.Number	IconColumn	Configure	Product	Product Name	Asset	Asset Ser #	List Price	Markup %	Price	Quantity	Term
1			PD_R_0001	PD_Renew_1	PD_R_0001	IBA1	\$123.00	0%	\$123.00	1	8/2/

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.

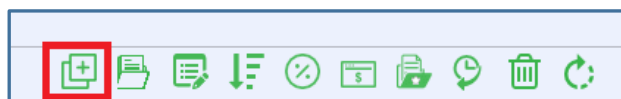


Figure 37: Add a Product

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.

Add Products

<input type="checkbox"/>	Picture	Product Name	List Price	Product Type
<input checked="" type="checkbox"/>		PD_Renew_10		--
<input type="checkbox"/>		PD_Renew_9		--
<input type="checkbox"/>		PD_Renew_11		BuildUp
<input type="checkbox"/>		PD_Renew_12		--
<input type="checkbox"/>		PD_Renew_13		--

< 1 2 3 4 5 ... 11 >

Add

Delete

Save

<input type="checkbox"/>	Picture	Product Name	List Price	Product Type
<input type="checkbox"/>		PD_Renew_10		--

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.

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

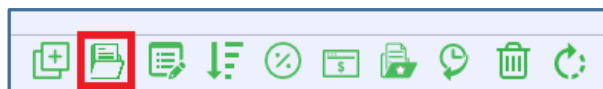


Figure 39: Add a Spool

- 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.

Add Spool

Spool Name : **Batch 1**

<input type="checkbox"/>	Picture	Product Name	List Price	Product Type
<input checked="" type="checkbox"/>		PD_Renew_10		--
<input checked="" type="checkbox"/>		PD_Renew_9		--
<input checked="" type="checkbox"/>		PD_Renew_11		BuildUp
<input type="checkbox"/>		PD_Renew_12		--
<input type="checkbox"/>		PD_Renew_13		--

< 1 2 3 4 5 ... 11 >

Add

Delete

Save

<input type="checkbox"/>	Picture	Product Name	List Price	Product Type
<input type="checkbox"/>		PD_Renew_10		--
<input type="checkbox"/>		PD_Renew_9		--
<input type="checkbox"/>		PD_Renew_11		BuildUp

Figure 40: Add a Spool Page

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





Line Items										
	S.Number	IconColumn	Configure	Product	Product Name	Asset	Asset Ser #	List Price	Markup %	Price
	Q				Q	Q	Q		Q	
1				Batch 1		--		\$30,022.00	0%	\$30,022.00
2				30 Deg ELBOW401	170250730 Deg ELBO	--		\$1,234.00	0%	\$1,234.00

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.

Add Write-In Product

Product Name *

Bolt

List Price *

250

Quantity

12

Discount

6

Save

Figure 43: Add Write-In Product Page

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



Line Items										
	S.Number	IconColumn	Configure	Product	Product Name	Asset	Asset Ser #	List Price	Markup %	Price
	Q				Q	Q	Q		Q	
1				WRITE-IN-001	Bolt	--		\$250.00	0%	\$250.00
2				30 Deg ELBOW401	170250730 Deg ELBO	--		\$1,234.00	0%	\$1,234.00

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.

Line Items											
Con...	Product	Product Name	Asset	Asset Se...	List Price	Markup...	Price	Quant...	Term Start	Term End	Gross Total
	WRITE-IN-001	Bolt	--		\$250.00	0%	\$250.00	12			\$3,000.00
	30 Deg ELBOW401	170250730 Deg ELi	--		\$1,234.00	0%	\$1,234.00	1			\$1,234.00

Figure 45: Enter a Discount Value

2. Click **Discount log** on the toolbar above the Line Items table.

The 'Discount log' dialogue box appears.

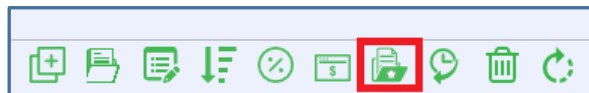


Figure 46: Discount Log

- 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.

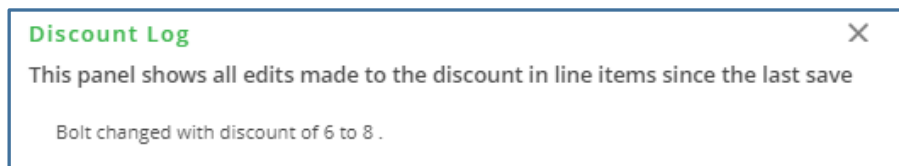


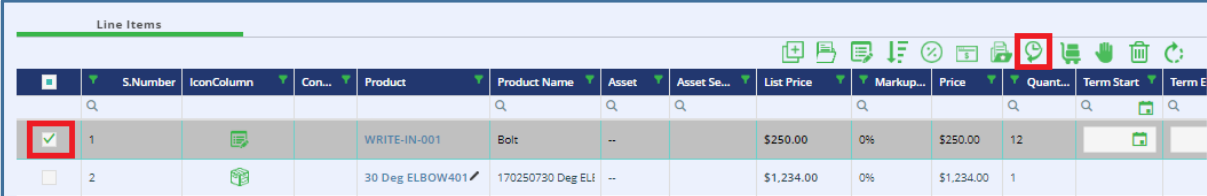
Figure 47: Discount Log Dialogue Box

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.

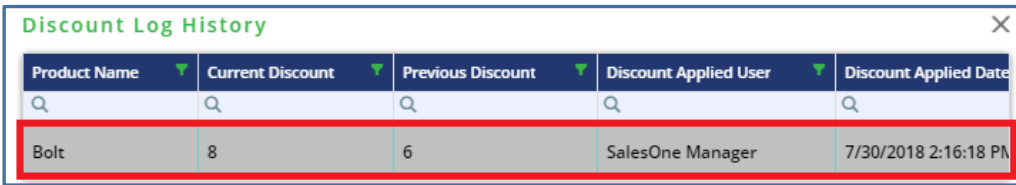
The 'Discount Log History' dialogue box appears.



Line Items													
	S.Number	IconColumn	Con...	Product	Product Name	Asset	Asset Se...	List Price	Markup...	Price	Quant...	Term Start	Term E
<input checked="" type="checkbox"/>	1			WRITE-IN-001	Bolt	--		\$250.00	0%	\$250.00	12		
<input type="checkbox"/>	2			30 Deg ELBOW401	170250730 Deg EL	--		\$1,234.00	0%	\$1,234.00	1		

Figure 48: Discount Log History

- The 'Discount Log History' dialogue box is shown below which displays the log history for the product.



Discount Log History				
Product Name	Current Discount	Previous Discount	Discount Applied User	Discount Applied Date
Bolt	8	6	SalesOne Manager	7/30/2018 2:16:18 PM

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.

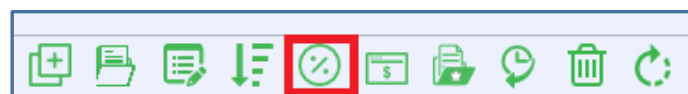


Figure 50: Bulk Product Discount

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.

Bulk Discount

10

Line Items

Apply

	Product Id		List Price	Discount %	Disc
	30 Deg ELBOW401	Spool	[object Object]	10	

Submit

Figure 51: Bulk Product Discount Page

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

Line Items											
Asset	Asset Ser #	List Price	Markup %	Price	Quantity	Term Start	Term End	Gross Total	Discount	Net Price	Product Type
--		\$250.00	0%	\$250.00	12			\$3,000.00	8%	\$2,760.00	--
eg ELBO'	--	\$1,234.00	0%	\$1,234.00	1			\$1,234.00	10%	\$1,234.00	--

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.

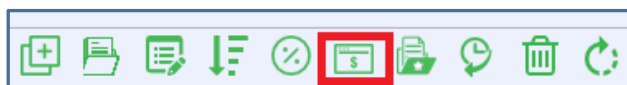


Figure 53: Bulk Markup

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.

3

All

All

Selected

Apply

	S.Number	Icon	Product	Product Name
	2		WRITE-IN-001	Bolt
	1		30 Deg ELBOW401	170250730 De

Submit

Figure 54: Bulk Markup Page

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



Line Items											
	S.Number	IconColumn	Configure	Product	Product Name	Asset	Asset Ser #	List Price	Markup %	Price	Quantity
1				WRITE-IN-001	Bolt	--		\$250.00	3%	\$257.50	12
2				30 Deg ELBOW401	170250730 Deg ELBO	--		\$1,234.00	3%	\$1,271.02	1

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.



Line Items											
	S.Number	IconColumn	Configure	Product	Product Name	Asset	Asset Ser #	List Price	Markup %	Price	Quantity
<input checked="" type="checkbox"/>	1			WRITE-IN-001	Bolt	--		\$250.00	3%	\$257.50	12
<input type="checkbox"/>	2			30 Deg ELBOW401	170250730 Deg ELBO	--		\$1,234.00	3%	\$1,271.02	1

Figure 56: Remove Line Items

2. Click **Yes**

The 'Delete successfully' dialogue box appears.


Are you sure you want to delete these rows?

No
Yes

Figure 57: Delete Message

3. Click **Ok**

The line item is deleted from the product list.



Deleted successfully

OK

Figure 58: Delete Successful Message

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


Line Items											
	S.Number	IconColumn	Configure	Product	Product Name	Asset	Asset Ser #	List Price	Markup %	Price	Quantity
<input type="checkbox"/>	1			30 Deg ELBOW401	170250730 Deg ELBO	--		\$1,234.00	3%	\$1,271.02	1

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.

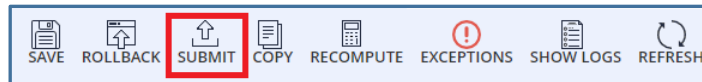
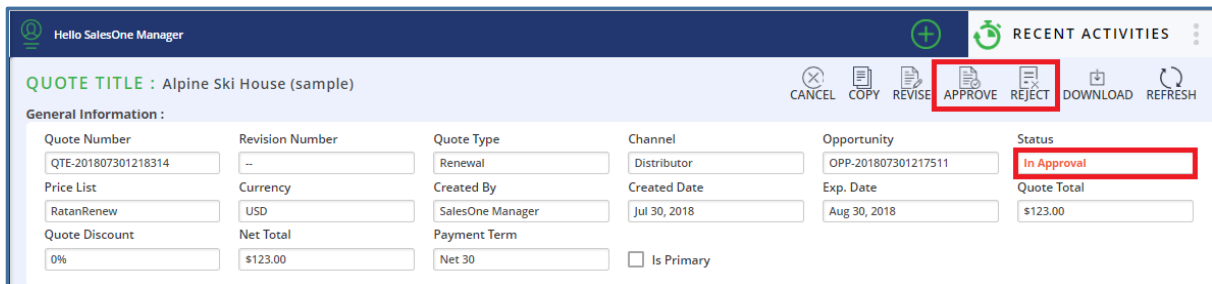


Figure 60: Submit Quote for Approval

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



QUOTE TITLE : Alpine Ski House (sample)

General Information :

Quote Number	Revision Number	Quote Type	Channel	Opportunity	Status
QTE-201807301218314	--	Renewal	Distributor	OPP-201807301217511	In Approval
Price List	Currency	Created By	Created Date	Exp. Date	Quote Total
RatanRenew	USD	SalesOne Manager	Jul 30, 2018	Aug 30, 2018	\$123.00
Quote Discount	Net Total	Payment Term			
0%	\$123.00	Net 30	<input type="checkbox"/> Is Primary		

Figure 61: Status as In Approval

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

- Click **Approve**

The dialogue box to enter the approve comment appears.

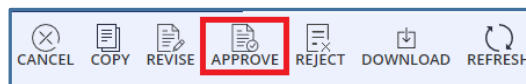


Figure 62: Click Approve

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



Show Approve

Enter Comments

Approved

Save

Figure 63: Approve Comment

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

3. Click **Publish**

The 'Publish' page appears.

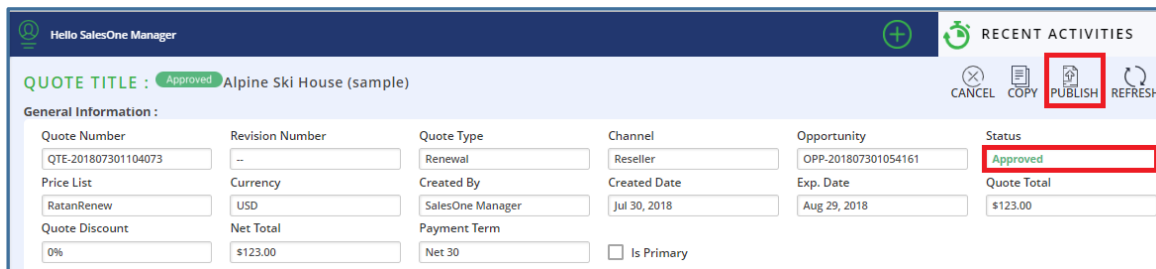


Figure 64: Status as Approved

4. Click **Save**

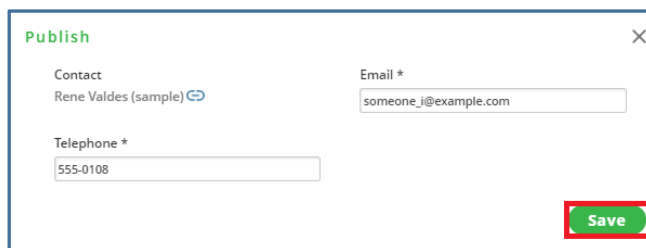


Figure 65: Publish Page

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

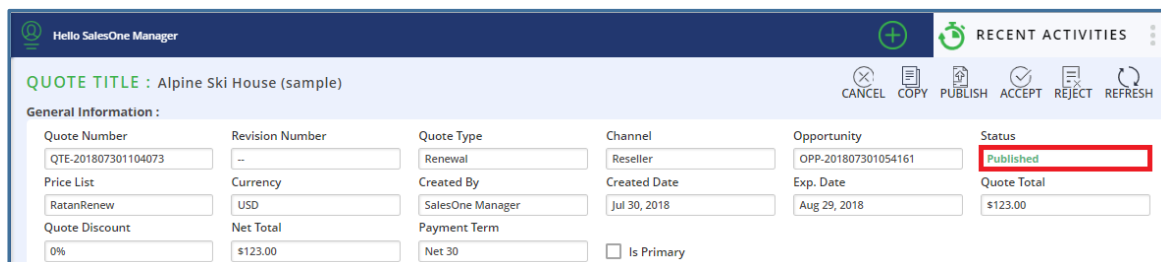


Figure 66: Status as Published

✓ If a sales manager wants to reject the quote,

1. Click **Reject**

The dialogue box to enter the reject comment appears.

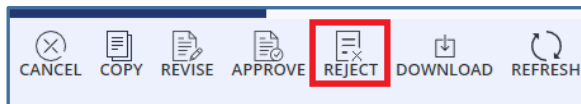


Figure 67: Click Reject

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


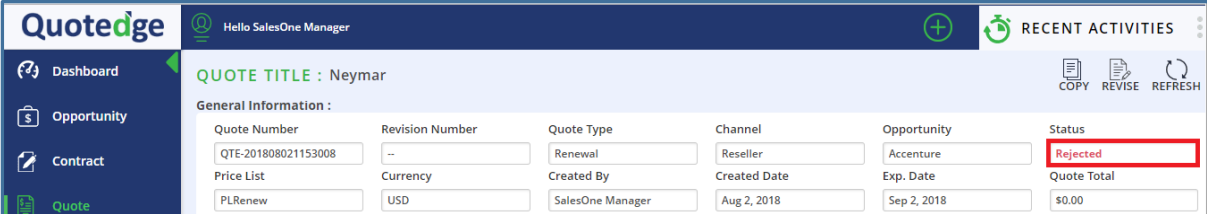


Figure 68: Reject Comment

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



Quotedge Hello SalesOne Manager

QUOTE TITLE : Neymar

General Information :

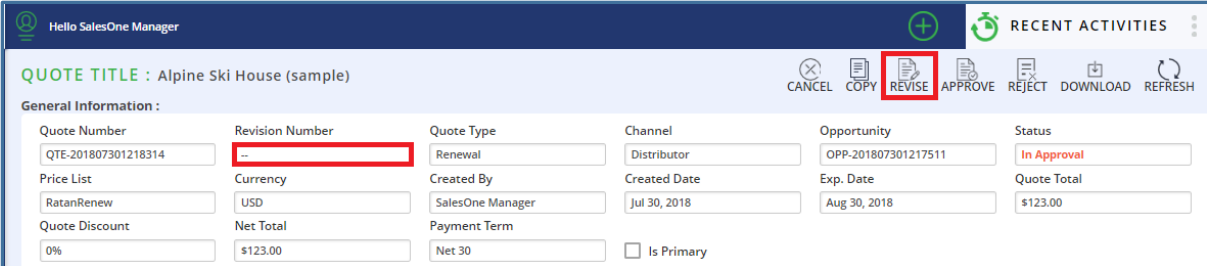
Quote Number	Revision Number	Quote Type	Channel	Opportunity	Status
QTE-20180821153008	--	Renewal	Reseller	Accenture	Rejected
Price List	Currency	Created By	Created Date	Exp. Date	Quote Total
PLRenew	USD	SalesOne Manager	Aug 2, 2018	Sep 2, 2018	\$0.00

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**.



Quotedge Hello SalesOne Manager

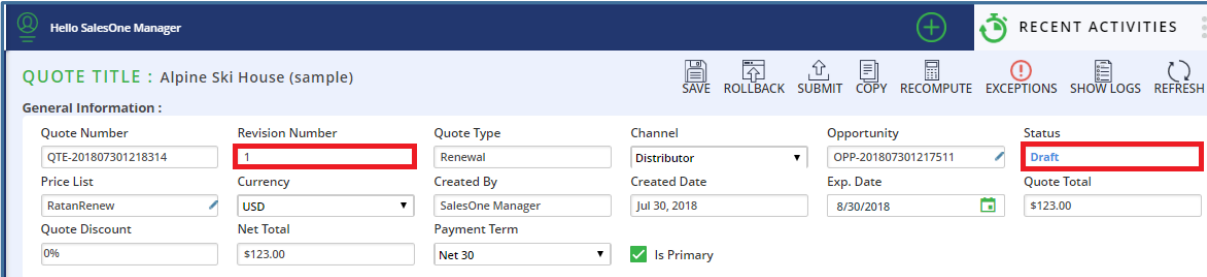
QUOTE TITLE : Alpine Ski House (sample)

General Information :

Quote Number	Revision Number	Quote Type	Channel	Opportunity	Status
QTE-201807301218314	--	Renewal	Distributor	OPP-201807301217511	In Approval
Price List	Currency	Created By	Created Date	Exp. Date	Quote Total
RatanRenew	USD	SalesOne Manager	Jul 30, 2018	Aug 30, 2018	\$123.00
Quote Discount	Net Total	Payment Term			
0%	\$123.00	Net 30	<input type="checkbox"/> Is Primary		

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.



Quotedge Hello SalesOne Manager

QUOTE TITLE : Alpine Ski House (sample)

General Information :


Quote Number	Revision Number	Quote Type	Channel	Opportunity	Status
QTE-201807301218314	1	Renewal	Distributor	OPP-201807301217511	Draft
Price List	Currency	Created By	Created Date	Exp. Date	Quote Total
RatanRenew	USD	SalesOne Manager	Jul 30, 2018	8/30/2018	\$123.00
Quote Discount	Net Total	Payment Term			
0%	\$123.00	Net 30	<input checked="" type="checkbox"/> Is Primary		

Figure 71: Status as Draft

5.3. Cancel a Quote

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

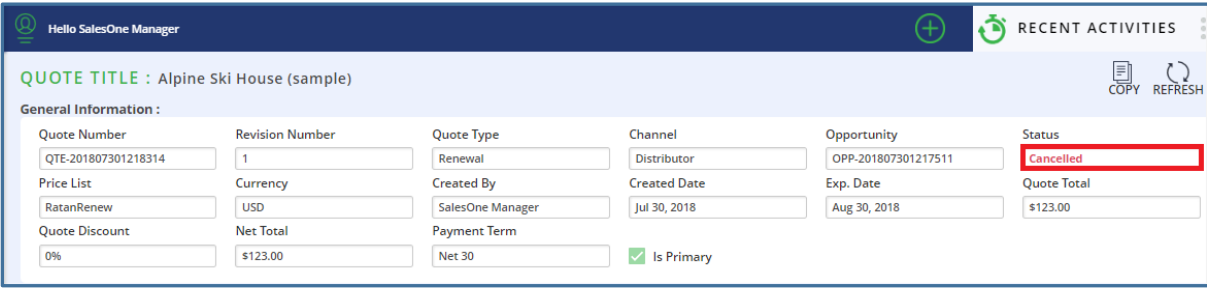
- On the quote information page, click **Cancel**.



CANCEL COPY REVISE APPROVE REJECT DOWNLOAD REFRESH

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.



Hello SalesOne Manager

QUOTE TITLE : Alpine Ski House (sample)

RECENT ACTIVITIES

COPY REFRESH

General Information :

Quote Number QTE-201807301218314	Revision Number 1	Quote Type Renewal	Channel Distributor	Opportunity OPP-201807301217511	Status Cancelled
Price List RatanRenew	Currency USD	Created By SalesOne Manager	Created Date Jul 30, 2018	Exp. Date Aug 30, 2018	Quote Total \$123.00
Quote Discount 0%	Net Total \$123.00	Payment Term Net 30	<input checked="" type="checkbox"/> Is Primary		

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**.

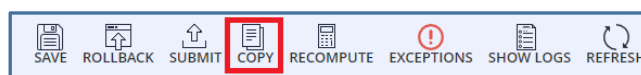


Figure 74: Click Copy

- 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.

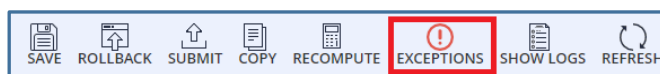


Figure 75: Click Exceptions

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

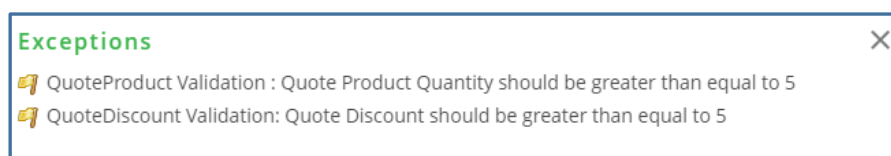


Figure 76: Exceptions Dialogue Box

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.

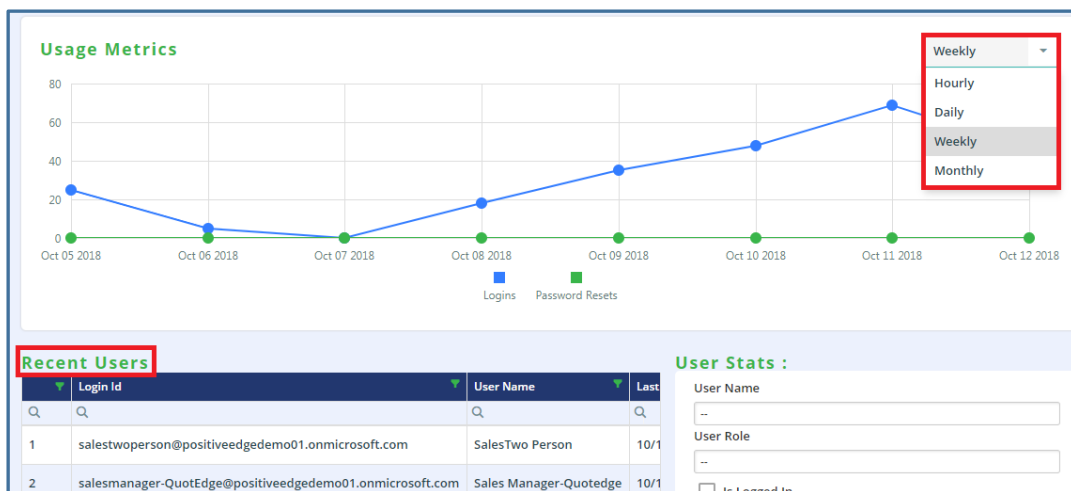


Figure 78: Recent Users

- 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.

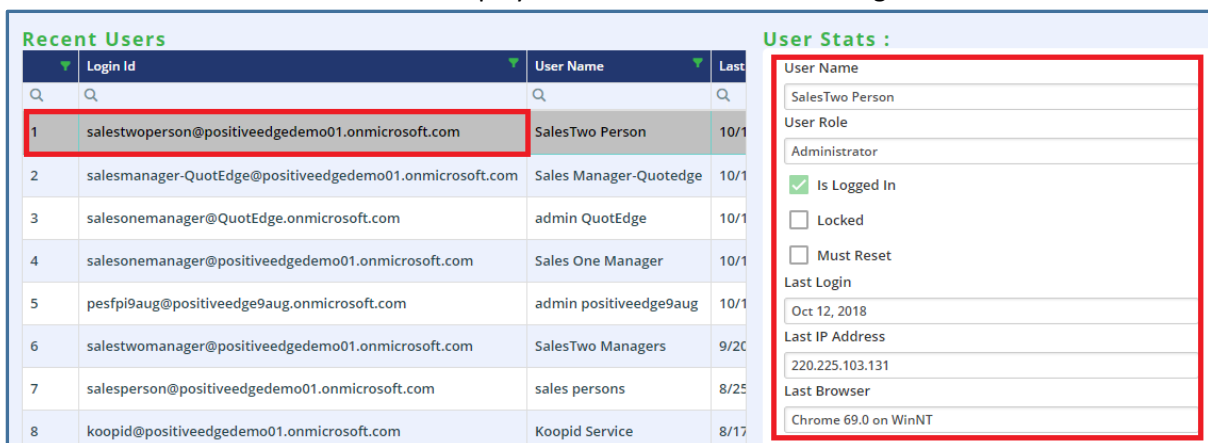




Figure 79: User Stats

- Click the  (**Logout**) icon on the top left of the dashboard page to log out of the application.
- Click the  (**Arrow**) icon next to the dashboard tab to minimize the Admin dashboard page tabs.

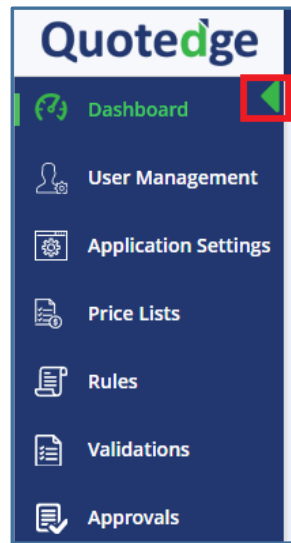


Figure 80: Click Arrow Icon

- 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.

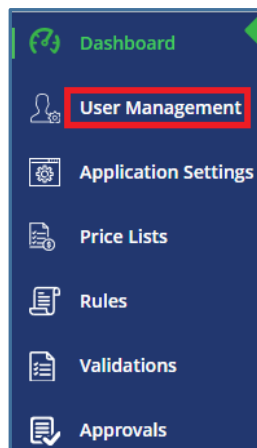


Figure 82: User Management

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.

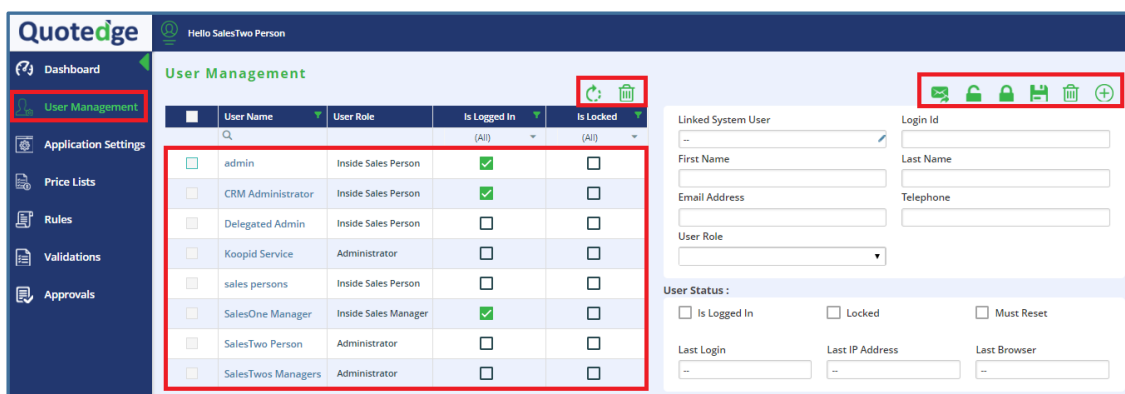



Figure 83: User Management Page

- 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.

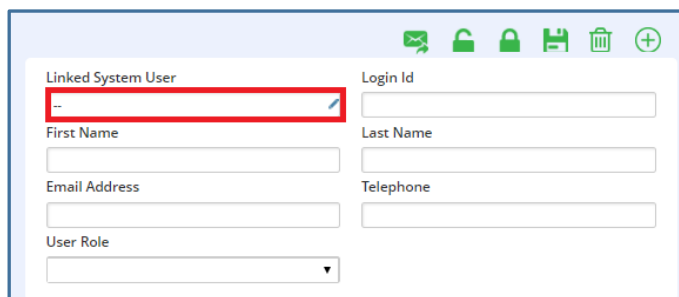


Figure 84: Linked System User

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

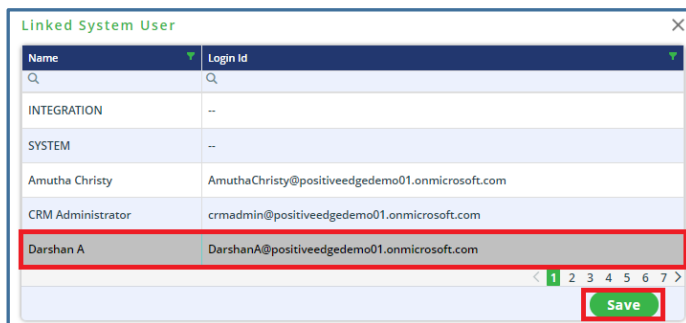
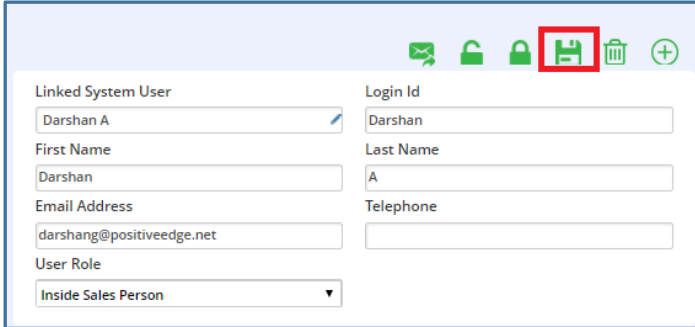


Figure 85: Linked System User

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



Linked System User: Darshan A

Login Id: Darshan

First Name: Darshan

Last Name: A

Email Address: darshang@positiveedge.net

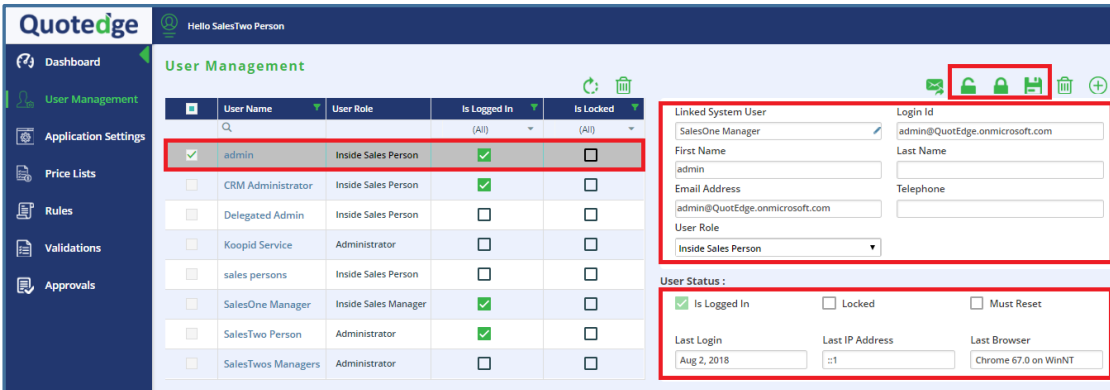
Telephone:

User Role: Inside Sales Person

Figure 86: Click Save

- 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.



	User Name	User Role	Is Logged In	Is Locked
<input checked="" type="checkbox"/>	admin	Inside Sales Person	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	CRM Administrator	Inside Sales Person	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Delegated Admin	Inside Sales Person	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Koopid Service	Administrator	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	sales persons	Inside Sales Person	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	SalesOne Manager	Inside Sales Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	SalesTwo Person	Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	SalesTwos Managers	Administrator	<input type="checkbox"/>	<input type="checkbox"/>

Linked System User: SalesOne Manager

Login Id: admin@QuotEdge.onmicrosoft.com

First Name: admin

Last Name:

Email Address: admin@QuotEdge.onmicrosoft.com

Telephone:

User Role: Inside Sales Person

User Status:

☒ Is Logged In ☐ Locked ☐ Must Reset

Last Login: Aug 2, 2018

Last IP Address: ::1

Last Browser: Chrome 67.0 on WinNT

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.

- Click **Application Settings** tab on the left side of the dashboard page. The 'Application Settings' page appears.

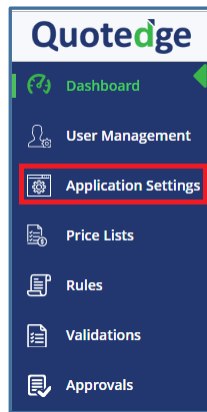
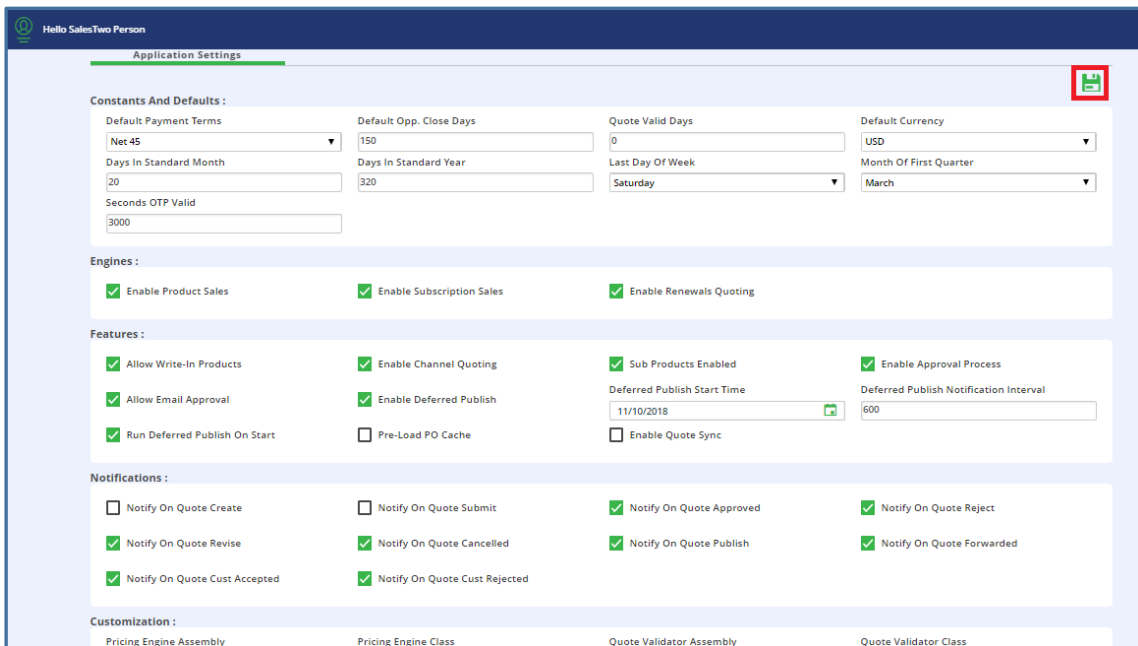


Figure 88: Click Applications Settings

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.



Constants And Defaults :

Default Payment Terms Net-45	Default Opp. Close Days 150	Quote Valid Days 0	Default Currency USD
Days In Standard Month 20	Days In Standard Year 320	Last Day Of Week Saturday	Month Of First Quarter March
Seconds OTP Valid 3000			

Engines :

- ☒ Enable Product Sales
- ☒ Enable Subscription Sales
- ☒ Enable Renewals Quoting

Features :

- ☒ Allow Write-In Products
- ☒ Enable Channel Quoting
- ☒ Sub Products Enabled
- ☒ Enable Approval Process
- ☒ Allow Email Approval
- ☒ Enable Deferred Publish
- Deferred Publish Start Time
11/10/2018
- Deferred Publish Notification Interval
600
- ☒ Run Deferred Publish On Start
- ☐ Pre-Load PO Cache
- ☐ Enable Quote Sync

Notifications :

- ☐ Notify On Quote Create
- ☐ Notify On Quote Submit
- ☒ Notify On Quote Approved
- ☒ Notify On Quote Reject
- ☒ Notify On Quote Revise
- ☒ Notify On Quote Cancelled
- ☒ Notify On Quote Publish
- ☒ Notify On Quote Forwarded
- ☒ Notify On Quote Cust Accepted
- ☒ Notify On Quote Cust Rejected

Customization :

Pricing Engine Assembly	Pricing Engine Class	Quote Validator Assembly	Quote Validator Class
-------------------------	----------------------	--------------------------	-----------------------

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**

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

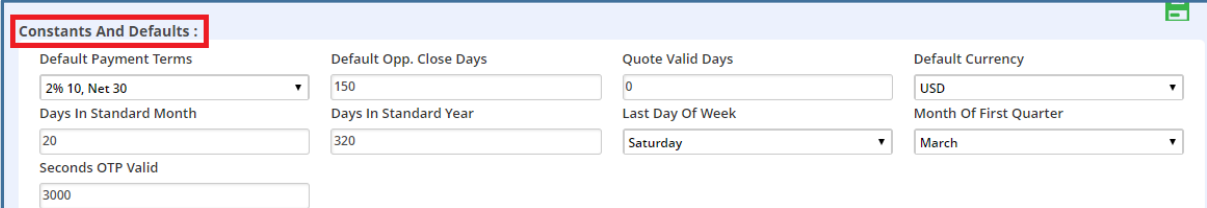


Figure 90: Constants and Defaults

- 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.

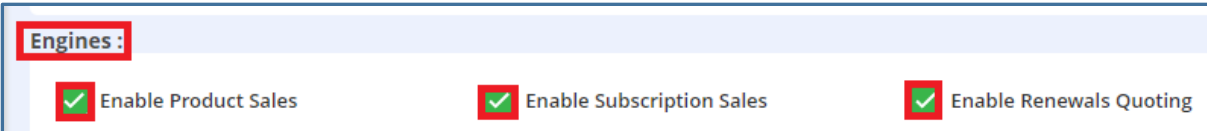


Figure 91: Engines

- 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**

Features :			
<input checked="" type="checkbox"/> Allow Write-In Products	<input checked="" type="checkbox"/> Enable Channel Quoting	<input checked="" type="checkbox"/> Sub Products Enabled	<input checked="" type="checkbox"/> Enable Approval Process
<input checked="" type="checkbox"/> Allow Email Approval	<input checked="" type="checkbox"/> Enable Deferred Publish	Deferred Publish Start Time 8/10/2018	Deferred Publish Notification Interval 600
<input checked="" type="checkbox"/> Run Deferred Publish On Start	<input checked="" type="checkbox"/> Pre-Load PO Cache	<input checked="" type="checkbox"/> 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.

Notifications :			
<input checked="" type="checkbox"/> Notify On Quote Create	<input checked="" type="checkbox"/> Notify On Quote Submit	<input checked="" type="checkbox"/> Notify On Quote Approved	<input checked="" type="checkbox"/> Notify On Quote Reject
<input checked="" type="checkbox"/> Notify On Quote Revise	<input checked="" type="checkbox"/> Notify On Quote Cancelled	<input checked="" type="checkbox"/> Notify On Quote Publish	<input checked="" type="checkbox"/> Notify On Quote Forwarded
<input checked="" type="checkbox"/> Notify On Quote Cust Accepted	<input checked="" type="checkbox"/> Notify On Quote Cust Rejected		

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.

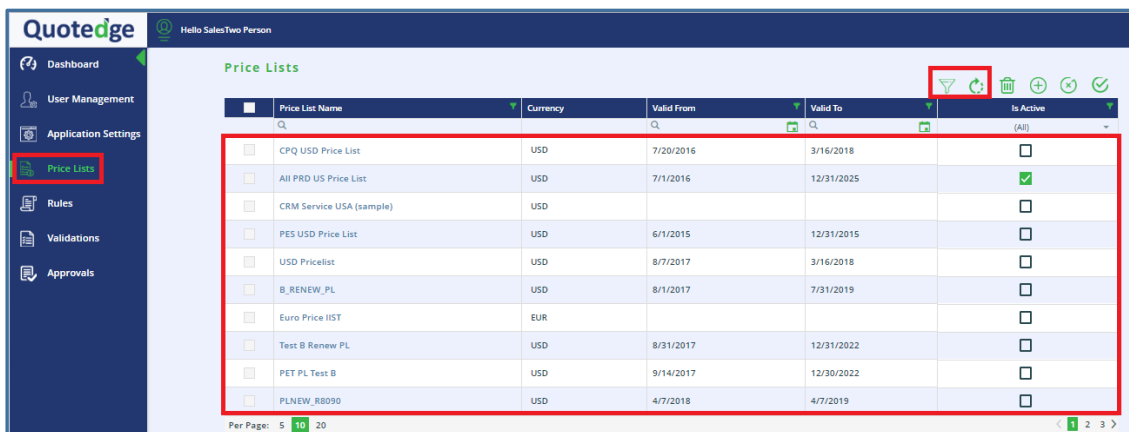
Customization :			
Pricing Engine Assembly	Pricing Engine Class	Quote Validator Assembly	Quote Validator Class
PositiveEdge.Crm.Apps.CPQ.Impl.dll	PositiveEdge.Crm.Apps.CPQ.Impl.PricingEngi	PositiveEdge.Crm.Apps.CPQ.Impl.dll	PositiveEdge.Crm.Apps.CPQ.Impl.QuoteValid

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.

- 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.



Price List Name	Currency	Valid From	Valid To	Is Active
CPQ USD Price List	USD	7/20/2016	3/16/2018	<input type="checkbox"/>
All PRD US Price List	USD	7/1/2016	12/31/2025	<input checked="" type="checkbox"/>
CRM Service USA (sample)	USD			<input type="checkbox"/>
PES USD Price List	USD	6/1/2015	12/31/2015	<input type="checkbox"/>
USD Pricelist	USD	8/7/2017	3/16/2018	<input type="checkbox"/>
B_RENEW_PL	USD	8/1/2017	7/31/2019	<input type="checkbox"/>
Euro Price IIST	EUR			<input type="checkbox"/>
Test B Renew PL	USD	8/31/2017	12/31/2022	<input type="checkbox"/>
PET PL Test B	USD	9/14/2017	12/30/2022	<input type="checkbox"/>
PLNEW_R8090	USD	4/7/2018	4/7/2019	<input type="checkbox"/>

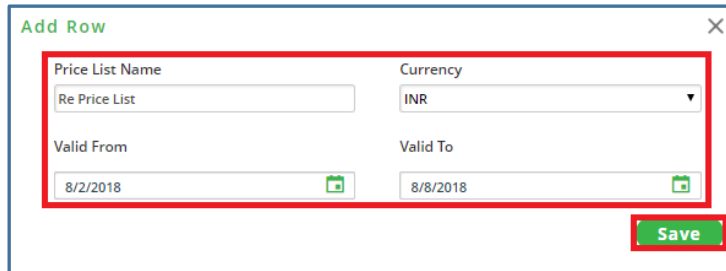
Figure 95: Price Lists Page

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



Figure 96: Click Add Row

- 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.



Add Row

Price List Name: Re Price List

Currency: INR

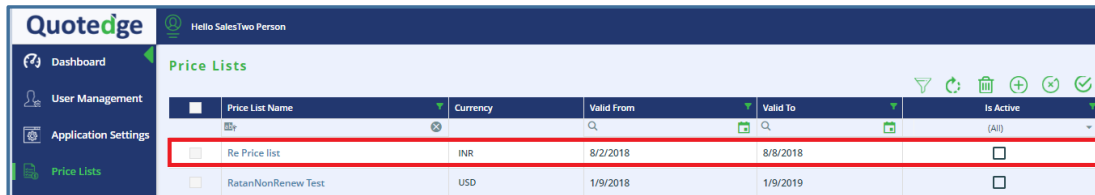
Valid From: 8/2/2018

Valid To: 8/8/2018

Save

Figure 97: Add Row Page

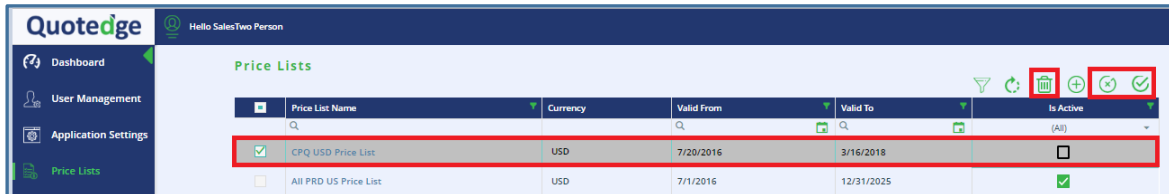
- The new price list 'Re Price List' created in the price lists page is shown below.



Price List Name	Currency	Valid From	Valid To	Is Active
Re Price List	INR	8/2/2018	8/8/2018	<input type="checkbox"/>
RetanNonRenew Test	USD	1/9/2018	1/9/2019	<input type="checkbox"/>

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.



Price List Name	Currency	Valid From	Valid To	Is Active
<input checked="" type="checkbox"/> CPQ USD Price List	USD	7/20/2016	3/16/2018	<input type="checkbox"/>
<input type="checkbox"/> All PRD US Price List	USD	7/1/2016	12/31/2025	<input checked="" type="checkbox"/>

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.





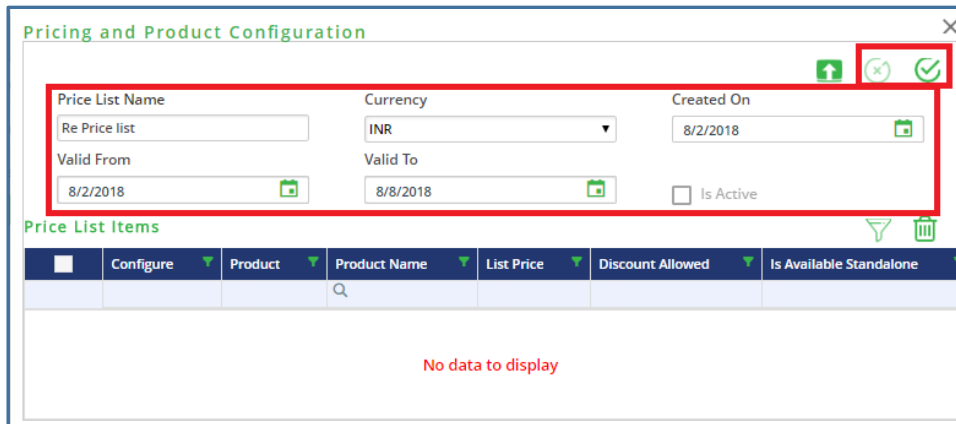
Price List Name	Currency	Valid From	Valid To	Is Active
<input checked="" type="checkbox"/> CPQ USD Price List	USD	7/20/2016	3/16/2018	<input type="checkbox"/>
<input type="checkbox"/> All PRD US Price List	USD	7/1/2016	12/31/2025	<input checked="" type="checkbox"/>

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. 



Pricing and Product Configuration

Price List Name: Re Price list | Currency: INR | Created On: 8/2/2018 | Valid From: 8/2/2018 | Valid To: 8/8/2018 | ☐ Is Active

Price List Items

Configure	Product	Product Name	List Price	Discount Allowed	Is Available Standalone
No data to display					

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.

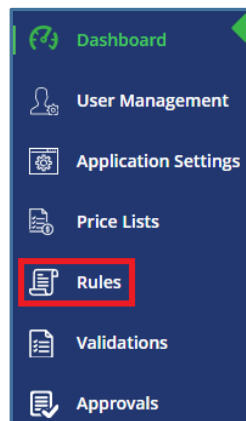



Figure 102: Click Rules

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

Rules Configuration						
	Name	Data Model	Root Class	Version	Is Active	Created On
	Q	Q	Q	Q	(All)	Q
<input type="checkbox"/>	QuoteRules	QUOTING	Quote	0.01	<input checked="" type="checkbox"/>	6/5/2018
<input type="checkbox"/>	QuoteProduct Rule	QUOTING	QuoteProduct	0.01	<input checked="" type="checkbox"/>	6/5/2018

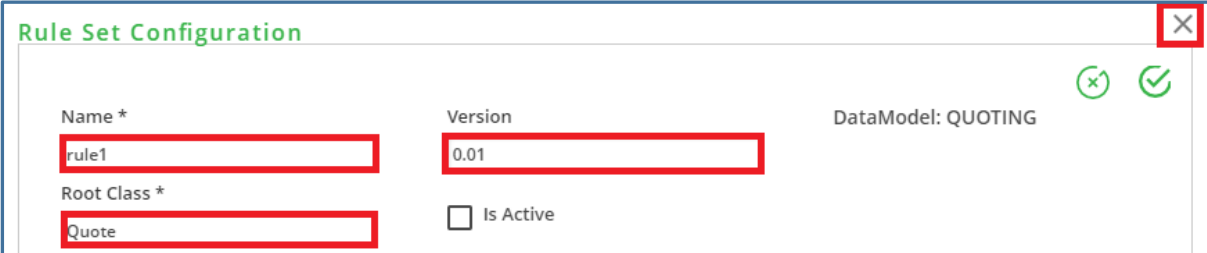
Figure 103: Rules Configuration

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

	Name	Data Model	Root Class	Version	Is Active	Created On
	Q	Q	Q	Q	(All)	Q10/15/2018
<input type="checkbox"/>	[New]	QUOTING	--	0.01	<input type="checkbox"/>	10/15/2018

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.



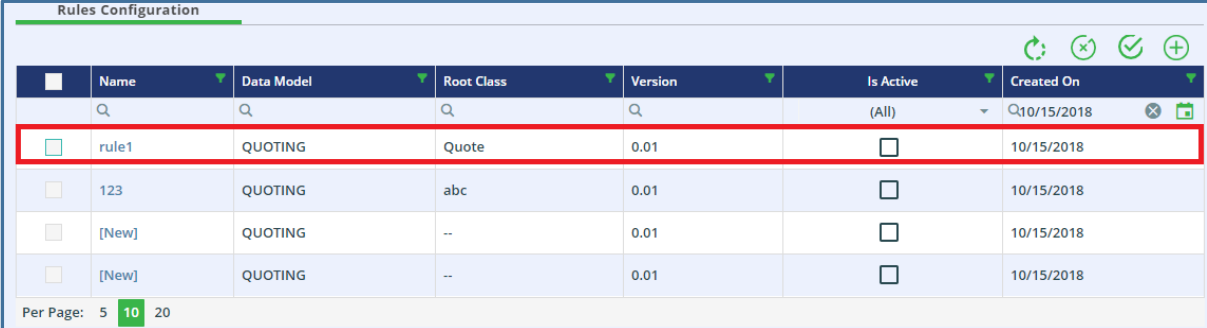
Rule Set Configuration

Name * Version DataModel: QUOTING

Root Class * ☐ Is Active

Figure 105: Rule Set Configuration

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



	Name	Data Model	Root Class	Version	Is Active	Created On
<input type="checkbox"/>	rule1	QUOTING	Quote	0.01	<input type="checkbox"/>	10/15/2018
<input type="checkbox"/>	123	QUOTING	abc	0.01	<input type="checkbox"/>	10/15/2018
<input type="checkbox"/>	[New]	QUOTING	--	0.01	<input type="checkbox"/>	10/15/2018
<input type="checkbox"/>	[New]	QUOTING	--	0.01	<input type="checkbox"/>	10/15/2018

Per Page: 5 10 20

Figure 106: Rules Configuration

Validate the Rule:

- 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.

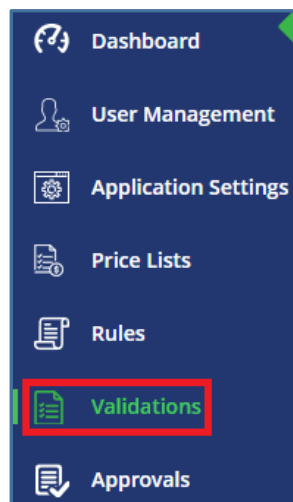



Figure 107: Click Validation

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

Validation Rules							
	Rule Name	Rule Set	Condition	Entity Name	Allow Submit	Active	
	Q	Q	Q	Q	(All)	(All)	
<input type="checkbox"/>	QuoteProduct V	QuoteProduct Rule	QuoteProduct.Quantity >= 5	QuoteProduct	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	QuoteDiscount V	QuoteDiscount Rule	Quote.Discount >= 5	Quote	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	


Figure 108: Validation Rules

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

Add Row

Rule Name *

Rule Set



Condition

Entity Name *

☐ Allow Submit

☐ Sales

☐ Direct

☐ Reseller

☐ Precursor

☐ Active

☐ Renewals


☐ Distributor

Message *

Save

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.

Note: 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**

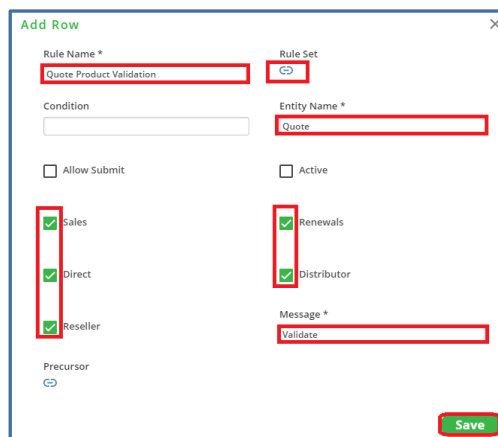



Figure 111: Add Row

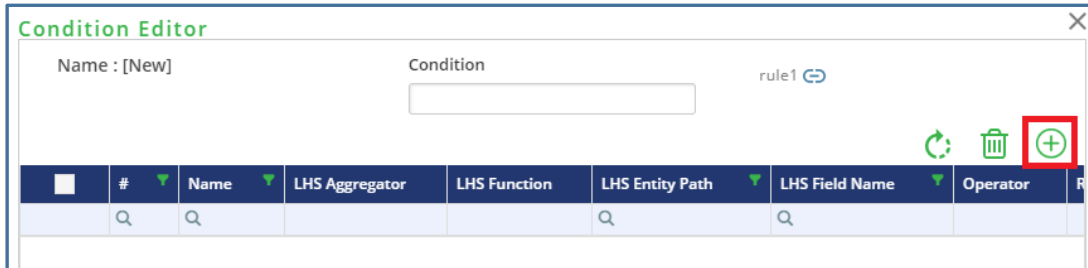
Apply Condition for the Rule:

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

Validation Rules					
<input type="checkbox"/>	Rule Name	Rule Set	Condition	Entity Name	Allow Submit
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	(All)
<input type="checkbox"/>	QuoteProduct Validation	QuoteProduct Rule	QuoteProduct.Quantity >= 5	QuoteProduct	<input checked="" type="checkbox"/>
<input type="checkbox"/>	QuoteDiscount Validation	QuoteDiscount Rule	Quote.Discount >= 5	Quote	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Quote Product Validation	rule1	[New]	Quote	<input checked="" type="checkbox"/>

Figure 112: Validation Rules list

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

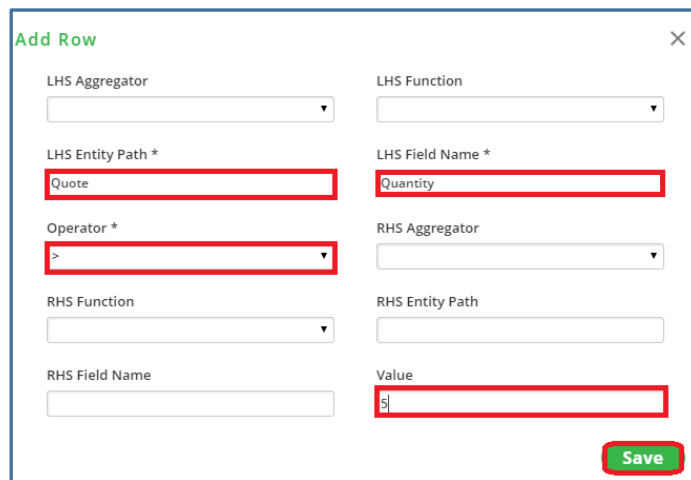


The 'Condition Editor' dialog box is shown. It has a title bar 'Condition Editor' and a close button. Inside, there's a 'Name' field with '[New]' and a 'Condition' field. Below these is a table with columns: #, Name, LHS Aggregator, LHS Function, LHS Entity Path, LHS Field Name, Operator, and R. The table is currently empty. In the top right corner of the dialog, there are three icons: a refresh icon, a delete icon, and an 'Add row' icon (a green circle with a plus sign), which is highlighted with a red box.

Figure 113: Condition Editor

- Enter the mandatory field details and then click **Save**.
The Mandatory field details to fill are:

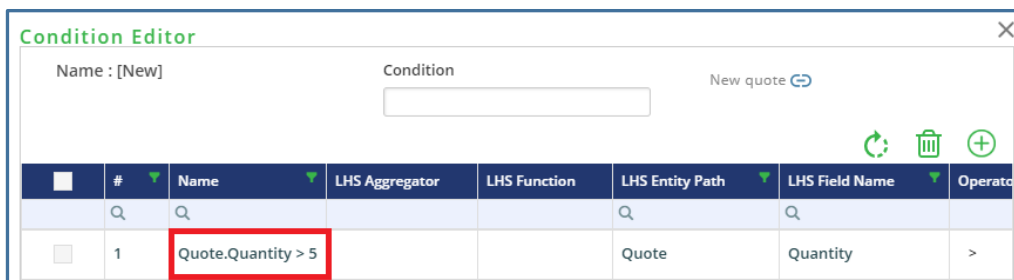
- Enter the **LHS Entity Path**
- Enter the **LHS Field Name**
- Select the **Operator** from the drop-down
- Enter a **Value** for the condition



The 'Add Row' dialog box is shown. It has a title bar 'Add Row' and a close button. Inside, there are several fields: 'LHS Aggregator' (dropdown), 'LHS Function' (dropdown), 'LHS Entity Path *' (text field with 'Quote' entered), 'LHS Field Name *' (text field with 'Quantity' entered), 'Operator *' (dropdown with '>' selected), 'RHS Aggregator' (dropdown), 'RHS Function' (dropdown), 'RHS Entity Path' (text field), 'RHS Field Name' (text field), and 'Value' (text field with '5' entered). A green 'Save' button is at the bottom right.

Figure 114: Add Row

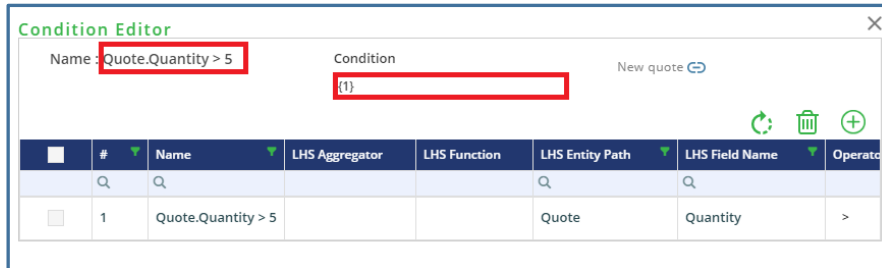
- The newly applied condition is displayed in 'Name' list under Condition Editor.



The 'Condition Editor' dialog box is shown again, but now the table has one row. The 'Name' column contains 'Quote.Quantity > 5', which is highlighted with a red box. The other columns are empty. The 'Add row' icon is still present in the top right corner.

Figure 115: Condition List under Condition Editor

- 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.



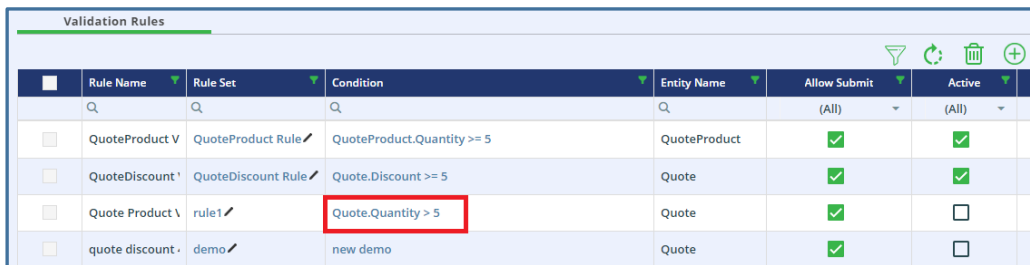
Condition Editor

Name: **Quote.Quantity > 5** Condition: **{1}** New quote [↗](#)

#	Name	LHS Aggregator	LHS Function	LHS Entity Path	LHS Field Name	Operator
1	Quote.Quantity > 5			Quote	Quantity	>

Figure 116: Condition Name

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



Rule Name	Rule Set	Condition	Entity Name	Allow Submit	Active
QuoteProduct V	QuoteProduct Rule	QuoteProduct.Quantity >= 5	QuoteProduct	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
QuoteDiscount	QuoteDiscount Rule	Quote.Discount >= 5	Quote	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Quote Product \	rule1	Quote.Quantity > 5	Quote	<input checked="" type="checkbox"/>	<input type="checkbox"/>
quote discount	demo	new demo	Quote	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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.

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

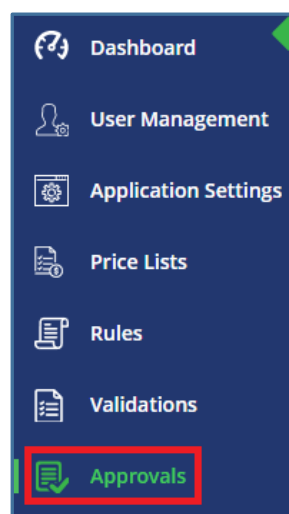

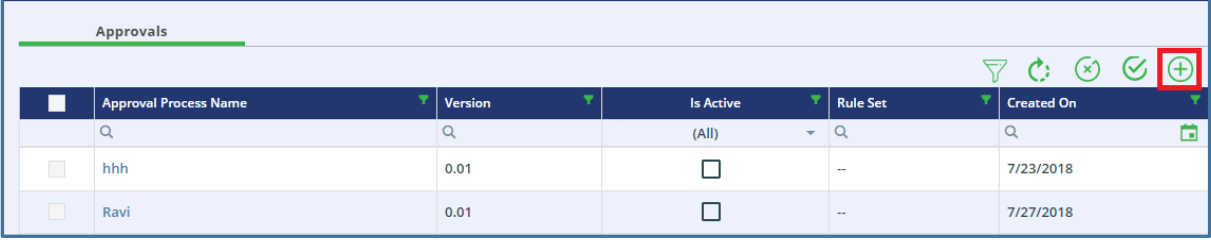


Figure 118: Click Approvals

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



The screenshot shows the 'Approvals' page with a table of approval processes. A red box highlights the '+ Add New' icon in the top right corner.

	Approval Process Name	Version	Is Active	Rule Set	Created On
	hhh	0.01	<input type="checkbox"/>	--	7/23/2018
	Ravi	0.01	<input type="checkbox"/>	--	7/27/2018

Figure 119: Approvals

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

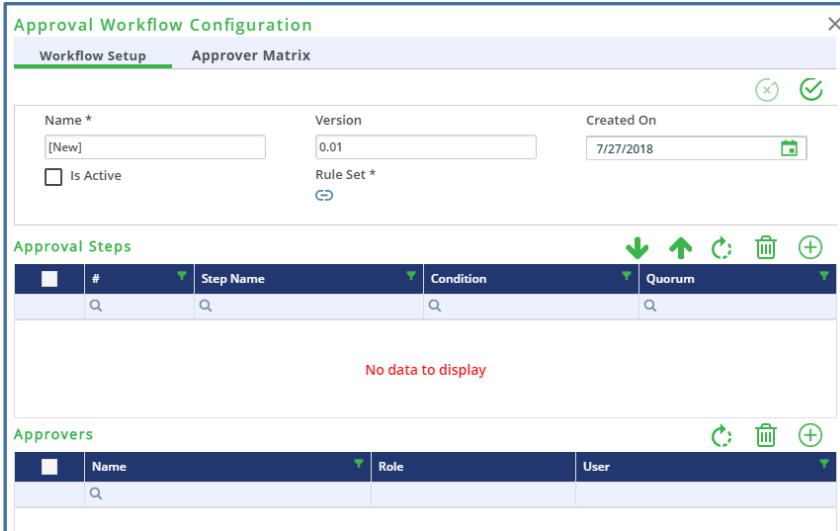


The screenshot shows the 'Approvals' page with a table of approval processes. A red box highlights the '[New]' entry in the 'Approval Process Name' column.

	Approval Process Name	Version	Is Active	Rule Set	Created On
	[New]	0.01	<input type="checkbox"/>	--	10/15/2018

Figure 120: Approvals

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



The screenshot shows the 'Approval Workflow Configuration' dialog box. It has two tabs: 'Workflow Setup' and 'Approver Matrix'. The 'Workflow Setup' tab is active, showing fields for Name, Version, Created On, Is Active, and Rule Set. Below these are sections for 'Approval Steps' and 'Approvers'.

Workflow Setup

Name *: [New] Version: 0.01 Created On: 7/27/2018

☐ Is Active Rule Set *: [Link icon]

Approval Steps


#	Step Name	Condition	Quorum

No data to display

Approvers

Name	Role	User

Figure 121: Approval Workflow Configuration

1. Enter the **Rule** name.
2. Under 'Approval Steps' Click  (**Add row**).
The 'Add Row' dialogue-box appears.

Name *

[New]

Version

0.01

Created On

7/27/2018

☐ Is Active

Rule Set *

Approval Steps

	#	Step Name	Condition	Quorum

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.

Add Row

Step Name

Werf

Quorum

123

Save


Figure 123: Add Row

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

Approval Steps

	#	Step Name	Condition	Quorum
	1	werf	[New]	123

Figure 124: Approval Steps

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

Condition Editor

Name : [New]

Condition

Quoter

	#	Name	LHS Aggregator	LHS Function	LHS Entity Path	LHS Field Name	Operator	

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

Add Row

LHS Aggregator

LHS Function

LHS Entity Path *

Quote

LHS Field Name *

Quantity

Operator *

>

RHS Aggregator

RHS Function

RHS Entity Path

RHS Field Name

Value

5

Save

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.

Condition Editor

Name : Quote.Quantity > 5

Condition

New quote

	#	Name	LHS Aggregator	LHS Function	LHS Entity Path	LHS Field Name	Operator	
	1	Quote.Quantity > 5			Quote	Quantity	>	

Figure 127: Condition Name

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

Approval Steps				
	#	Step Name	Condition	Quorum
	1	werf	Quote.Quantity > 5	123

Figure 128: Approval Steps

- Under 'Approvers' section Click  (Add row) to add name and Roles for the approver. The 'Add Row' dialogue box appears.

Approvers			
	Name	Role	User

Figure 129: Approvers

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

Add Row

Name

Mr

Role

Inside Sales Manager

User

Save

Figure 130: Add Row

- 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 Locator
MS	Microsoft
CPQ	Quoting, Pricing and Configuration