

QUOTATION PARAMETERS

When a user clicks Add to Quotation and generates a quote, the shopping cart template is then displayed. Above the template are a series of tabs. By default Quotation, Billing & Shipping, and Attachments are displayed, see Figure 45-1. On the Admin side, more tabs, and fields within those tabs, can be defined.

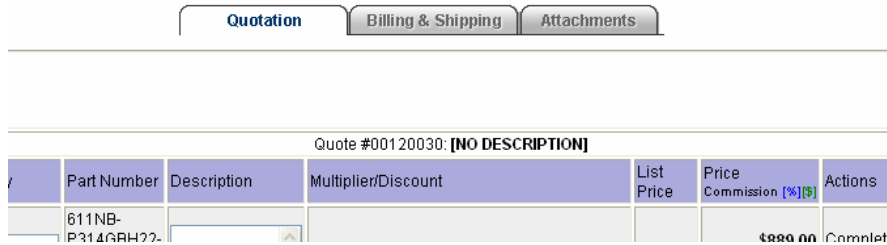


Figure 45-1 – Default Tabs for Quotes

To define Quotation Parameters click the **Quote/Cart Properties** under the **Quotations/Projects** drop down. A fully defined page is shown in Figure 45-2.

User Type: All User Types										
Strong Name	Label	Value Type	Attribute	Calculated by	Transfers to Items	Required	List as line item	Set as Global	Order Param. Rank	Show in tab
test	test	Free Form		CLR					0	Quote description
Desktopmemory	Desktopmemory	Attribute	Desktopmemory	CLR					0	Quote description
HDD	HDD	Attribute	Hdd	CLR					0	Quote description
HDD Specification	HDD Specification	Attribute	HDD_spec	CLR					0	Quote description
HDD Documentation	HDD Documentation	Attribute	HDD_Docs	CLR					0	
Processor Specification	Processor Specification	Attribute	Processor_specs	CLR					0	Quote description
Processor Documentat	Processor Documentat	Attribute	Processor_Docs	CLR					0	Quote description
Specifications	Specifications	Attribute	Specifications	CLR					0	Proposal Selectic
Documentation	Documentation	Attribute	Documentation	CLR					0	Proposal Selectic
Terms and Conditions	Terms and Conditions	Attribute	terms1	CLR					0	Proposal Selectic
OpportunityID	OpportunityID	Free Form		CLR					0	
PO number	PO number	Free Form		CLR					0	Order Details
Desired delivery date	Desired delivery date	Date		CLR					0	Order Details
Project name	Project name	Free Form		CLR					0	Quote description

Figure 45-2 – Quotation Parameter Definition

At the top of the page, the drop down box labeled **User Type** contains user groups. Quotation Properties can be defined for All User Types or for a specific type. If a specific type is chosen, then only users logged as that type will be able to see those parameters defined. Any properties defined for All User Types will be visible by all users.

The Strong Name is another way that properties can be shared among users. Strong Names are defined in the first column of the table. Because anything defined under All User Types is already shared by all users, this is mainly used when a specific user type is being defined.

STRONG NAMES

The dropdown box **User Type** determines User Type for which this Quote Properties belongs. If the User Type is **All User Types**, then this Quote Properties belongs to the all User Types.

Strong Names enables Quote Sharing. If this field is populated then this Quote property can be shared among all User Types.

If, for example, we add some Quote Property and leave the **Strong Names** Field blank. If we changed the User Type of this Quote, then this Quote Property remains in the database only in the case that the Quote Property with the same name already exists in the new User Type Shopping Cart (or in the case that this Quote Property is "All User Types", of course)

If a Quote Property with the same name as ours doesn't exist in the new User Type Shopping Cart then our Quote Property will be lost.

To prevent this and to enable Quote Sharing we have to use **Strong Name** field.

So, Strong Names enable Quote Properties to be saved permanently with Quote.

For example, we can create 4 Quote Properties:

1. "Strong", for User Type "Customers", with populated "Strong Name" field
2. "Not Strong", for User Type "Customers", "Strong Name" field leaves blank
3. "Not Strong 2", for User Type "Customers", "Strong Name" field leaves blank
4. "Not Strong", for User Type "SALES REP", "Strong Name" field leaves blank

Now we log in as a user who belongs to User Type "Customer", create the Quote and then assign the Quote to another user who belongs to User Type "SALES REP".

What will be happened with our Quote Properties?

1. "Strong" will be in the "SALES REP" because it has "Strong Name" field populated
2. "Not Strong" will be also the in "SALES REP" because there are the Quote Property with the same name in the "SALES REP" User Type.
3. "Not Strong 2" will be removed from database – it has "Strong Name" field blank and there is not "Not Strong 2" Quote Property in the "SALES REP" User Type. "Not Strong 2" Quote Property will be lost.

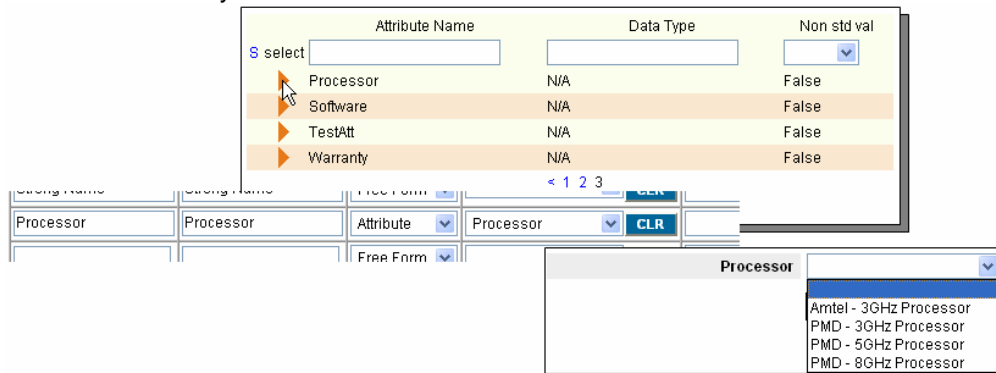
OTHER FIELDS

Label – This field designates a name for the property. This name will be displayed to the user.

Value Type – There are four choices available:

- Free Form – User can enter any value into a text box
- Date – User is able to enter a date into a text box. An error will be displayed if anything other than a date is entered.
- Attribute – User is able to choose from a list of values from a specified attribute.
- Long Text – User can enter a long string of text that has multiple lines.

Attribute – Use this in combination with the Value Type of Attribute. Click the drop down arrow to display all the Attributes. Search the list for the desired Attribute, and then click the symbol next to the Attribute Name to select it. The Attribute is then automatically inserted into the field.



The screenshot shows a software interface with a dialog box for selecting an attribute. The dialog has a search field with 'S select' and a table with the following data:

Attribute Name	Data Type	Non std val
Processor	N/A	False
Software	N/A	False
TestAtt	N/A	False
Warranty	N/A	False

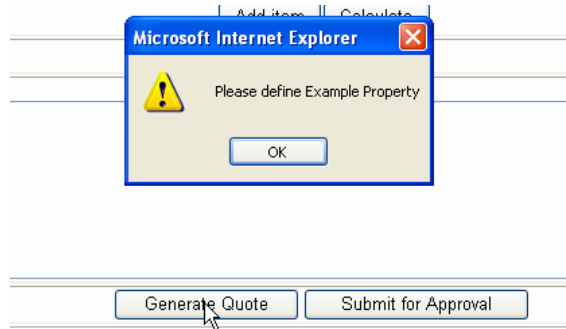
Below the dialog, a dropdown menu is open for the 'Processor' attribute, showing the following options:

- Processor
- Amtel - 3GHz Processor
- PMD - 3GHz Processor
- PMD - 5GHz Processor
- PMD - 8GHz Processor

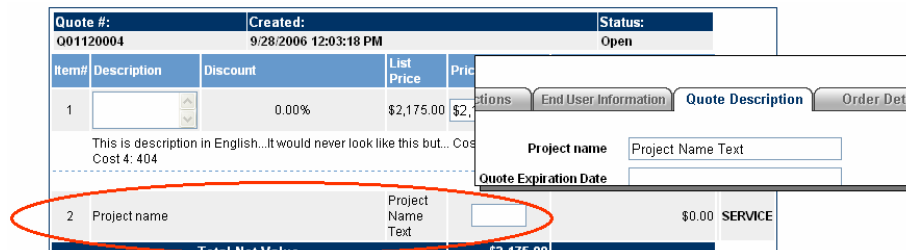
Calculated by – This is used to perform calculations on the property. A better method of performing these calculations is through **Cart Level Aggregates**. See section on Cart Level Aggregates in Chapter 42 for more information.

Transfers to Items – This determines whether the selection chosen for the property will affect the configuration of the product.

Required – If designated as Required, the quote cannot be processed until this field is filled. An asterisk is placed next to the name of the property indicating it is required. If a User tries to process a quote without entering this field an error will be displayed.



List as Line Item – If this is selected, then the property will be displayed in the shopping cart as a line item. It will not be displayed in the shopping cart until it is entered as saved under the Tab.



Set as Global – This is used to set the property to be a Global Information (GI) Variable. These variables can then be used in other parts of CPQ using GI Tags. Refer to Chapter 42 for more information.

NOTE: See Appendix A for a complete list of Tags.

Order Parameter/Rank – Use the check box to select the property and make it active. Setting the rank determines the order that the property will be displayed on the screen. Properties with lower numbers will appear at the top of the screen and higher numbers will appear at the bottom.

Show in Tab – Click the drop down arrow to select the Tab under which the property will reside. All Tabs created under **Global Parameters** are available. The rank used for the Tab will determine where the Tab is placed on the Quotation screen. Lower numbers are displayed to the left, while higher numbers are displayed to the right.