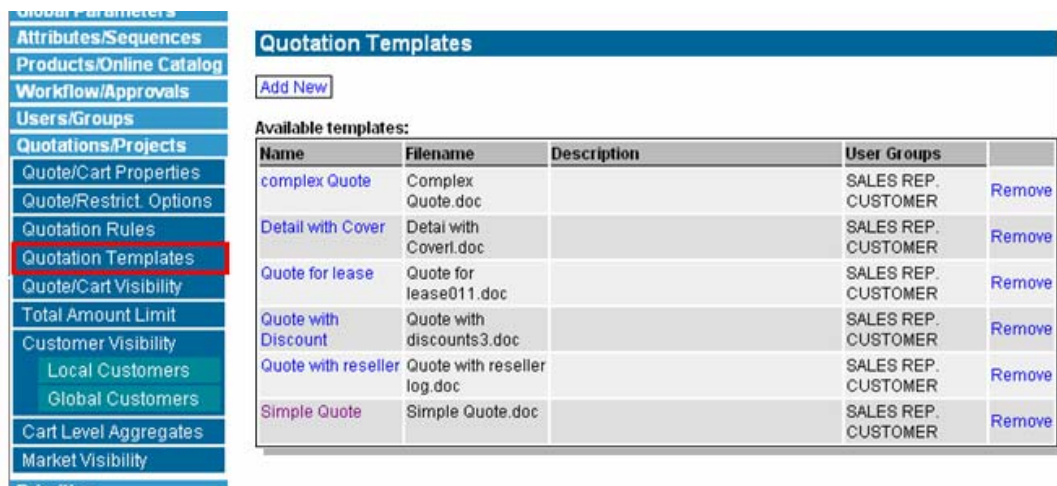


## WORD QUOTE GENERATION

The **Word Quote Generation** process will create Word Quotes based on the user's input, information found in a Quote, and Customer information.

Quotation Templates are Word templates that are accessible by the users in the preparation of their quotations. Multiple templates can be uploaded if different designs are required. User groups can be given rights to use all or only specific templates.

To access Quotation Templates, click the **Quotation Templates** link under **Quotation/Projects**. This will bring up the screen shown in Figure 41-1.



Name	Filename	Description	User Groups	
complex Quote	Complex Quote.doc		SALES REP. CUSTOMER	<a href="#">Remove</a>
Detail with Cover	Detail with Cover.doc		SALES REP. CUSTOMER	<a href="#">Remove</a>
Quote for lease	Quote for lease011.doc		SALES REP. CUSTOMER	<a href="#">Remove</a>
Quote with Discount	Quote with discounts3.doc		SALES REP. CUSTOMER	<a href="#">Remove</a>
Quote with reseller	Quote with reseller log.doc		SALES REP. CUSTOMER	<a href="#">Remove</a>
Simple Quote	Simple Quote.doc		SALES REP. CUSTOMER	<a href="#">Remove</a>

Figure 41-1 – Quotation Templates

From this screen existing templates can be edited or new templates can be added. To edit an existing template, click on the **template name**. This will bring up the **Add New Quotation Template**, as in the example shown in Figure 41-3.

Clicking on **Add New** will bring up a blank **Add New Quotation Template** screen as shown in Figure 41-2.

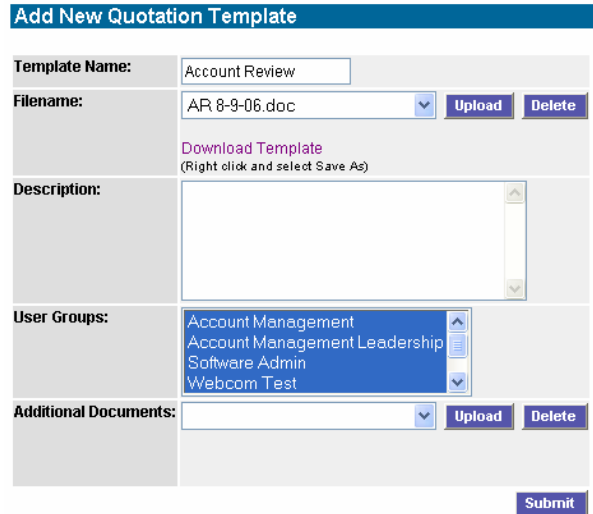


Figure 41-2 – Add New Quotation Template

**Name** – The name of the Template. This will be seen by the user when they pick which to use for a Quote.

**Filename** – The name of the Word Template. If already upload, the file can be chosen from the drop down box. To upload a new file, click the **Upload** button. A pop-up screen will appear where the file can be opened, as shown in Figure 41-3. Files can easily be found using the **Browse** button.

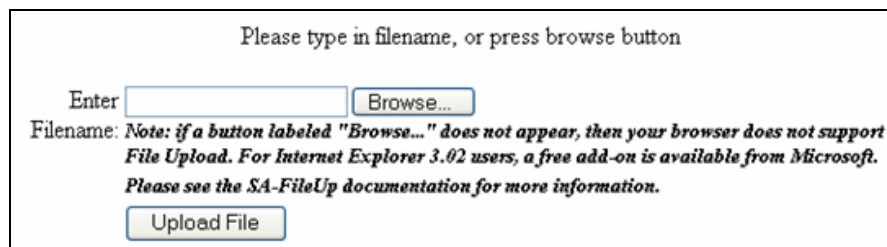


Figure 41-3 – Template Upload

**Description** – Enter a short description of this template. Not required, but may be necessary for other administrators to understand the purpose of the Template.

**User Groups** – The list of user groups which can see template. Multiple users can be selected by holding down the **Ctrl** key and clicking each group.

**Additional Documents** – If applicable, other documents can be included with the template. This is available for cases when documents related to the template need to be printed or viewed in addition to the template document.

When complete click the **Submit** button to save the Template.

## WORD QUOTE TAGS

Word Quote Tags are used to transfer information from WebSource into a **Word Document**. This is done by adding Word Tags into the document using normal text. For example:

Total item price is: <<C\_PRICE>>.

<<C\_PRICE>> is the Word Tag which retrieves the total item price when the quotation is generated.

These expressions are entered into a Word document in the places or order that they will be displayed. Virtually every piece of information existing in WebSource is available to be placed into a Word document.

**NOTE:** See Appendix A – Word Quote Tags for complete list of tags.

### EXAMPLE 1:

```
<<C>>  
<<C_PATTR(<*Value(Software Description)*>)>>  
<<C_END>>
```

This code can be used quite often. <<C\_PATTR(...)>> calls any standard CPQ tag. In this example, it calls the tag <\*Value(attribute name)\*>. This tag returns the display value of the named attribute. This means that every Attribute Display Value for Software Description will be printed.

Output can look like this:

```
  Description of value 1  
  Description of value 2  
  Description of value 3
```

In a real situation, Description of value X is the description of a value, such as 128 USB Flash Memory Card.

**EXAMPLE 2:**

Tags can also be used to display Quote information. Figure 41-4 shows what the tags would look like to display an output displayed in Figure 41-5.

Item	Part Number	Description	Quantity	Price	Extended Amount
<<CT_L I>>					
<<C_ID >>	<<C_PNUM>>	<<C_DESC>>	<<C_QTY> >	<<C_DESIRE D>>	<<C_PRICE>>
					<b>&lt;&lt;Q_QUOTE(TOTAL)&gt;&gt;</b>

Figure 41-4 – Tags for a Quote

As shown in Figure 41-5, each Tag displays a different piece of information. The headings have been “hard-coded”, which means they do not change at all when the information is filled into the document.

Item	Part Number	Description	Quantity	Price	Extended Amount
1	DT-A-C-W	Business Desktop. 0.5 GB PC3200 (400 MHz) memory, 200GB Ultra HDD, Amtel 9 3GHz Processor, with 96x/64x/96x CD-RW Drive and . Windows Home 2003 operating system.	1	\$1,210.00	\$1,210.00
2	DT-3-C-W	Business Desktop. 2x512 MB Dual Channel PC3200 memory, 400GB Ultra HDD, PMD 3 3GHz Processor, with 96x/64x/96x CD-RW Drive and . Windows Home 2003 operating system.	1	\$1,420.00	\$1,420.00
3	DT-8-D-W	Business Desktop. 2x512 MB Dual Channel PC3200 memory, 800GB Ultra HDD, PMD 8 8GHz Processor, with 64x DVD-ROM Drive and . Windows Home 2003 operating system.	1	\$1,990.00	\$1,990.00
					<b>\$4,630.00</b>

Figure 41-5 – Output from tags for a Quote

**EXAMPLE 3:**

Word Tags can also be used to insert a Document within another Document. Both documents can be dynamically created and filled with information. This may be useful if a document needed to be included that had some general information, such as terms and conditions, or as in this example a logo. Examples of the Tags are shown in Figure 41-6.

```
We welcome any inquiries about our solutions, their capabilities, or our ability to integrate it into your current or
planned business process.
We are grateful for this opportunity and look forward to showing you why other organizations have chosen us over a
cast of others.

Respectfully,
<<Q_USER(NAME)>>

<<Q_USER(EMAIL)>>
<<Q_USER(PHONE)>>

_____  

<<C_PATTR_FILE (<*Value(Logo)*>>>
```

Figure 41-6 – Word Tags for inserting a Document within a Document

All the Tags that start with <<Q\_ are taking information from the Quote itself. The <<C\_PATTR\_FILE(...)>> tag calls the CPQ tag <\*Value(Logo)\*>. This expression, when entered into a Word document, assumes that the value will return a file and inserts it. Though it is a simple, but powerful tag, other things need to be setup in order for it to work properly.

**Logo** is an attribute created specifically for this Document generation. It has one value, which is the file name logo.doc. This is the exact file name of the file being inserted. In addition to creating this attribute, the file (logo.doc) needs to be uploaded into the system so that it resides in the /quotation/user\_templates folder. To do this, simply open any existing Quotation Template or click Add New to open a blank Template page. Click **Upload** for Additional Documents. Find the desired file and Upload it. Once it is uploaded, exiting the page is okay without saving anything. The file has been uploaded, so no other changes need to be made.

With the file uploaded, the Tag shown in Figure 41-6 will insert the document specified, as shown in Figure 41-7.

```
We welcome any inquiries about our solutions, their capabilities, or our ability to integrate it into your current or
planned business process.
We are grateful for this opportunity and look forward to showing you why other organizations have chosen us over a
cast of others.

Respectfully,
Aaron

_____  



 
```

Figure 41-7 – Output of Document within a Document

## USER SIDE

On the user side, after the product is configured and **Add To Quote** is selected, the screen shown in Figure 41-8 is displayed. This allows the user to quickly generate a quotation.

Product List Price:		\$899.00	
Product multiplier:	1.00	Product discount:	0.00
Product Net Value		\$899.00	
<b>Total Net Value</b>		<b>\$899.00</b>	
Freight	-please select-	\$0.00	
<b>Total Amount</b>		<b>\$899.00</b>	

Buttons: Add item, Calculate, Generate Quote, Submit for Approval

Select currency: USD

Add Quotation's Comments

Figure 41-8 – User View – Quotation Template

When complete, the user selects **Generate Quote**. This brings up another screen where the user selects the appropriate quotation template. As shown in Figure 41-9, the user can select a Template from the drop down box. Clicking **Generate Quote** will bring up a processing screen with a progress bar. When finished, an icon will appear that the user can select to view the Quote. A sample of a Word Quote is displayed in Figure 41-10.

**Please select a template below and click on "Generate Quote".**

Available templates:

- complex Quote
- Detail with Cover
- Quote for lease
- Quote with Discount
- Quote with reseller
- Simple Quote
- Simple Quote w Insert
- sample quote job quote

Generate Quote

Figure 41-9 – Selection of Quote Templates



Figure 41-10 – Sample Word Quote

**NOTE:** There are restrictions to the names used for Word Templates. Characters such as a space, (' '), &, %, ... cannot be used.