

WebSource CPQ v10.2

CPQ v10.2 Release Notes

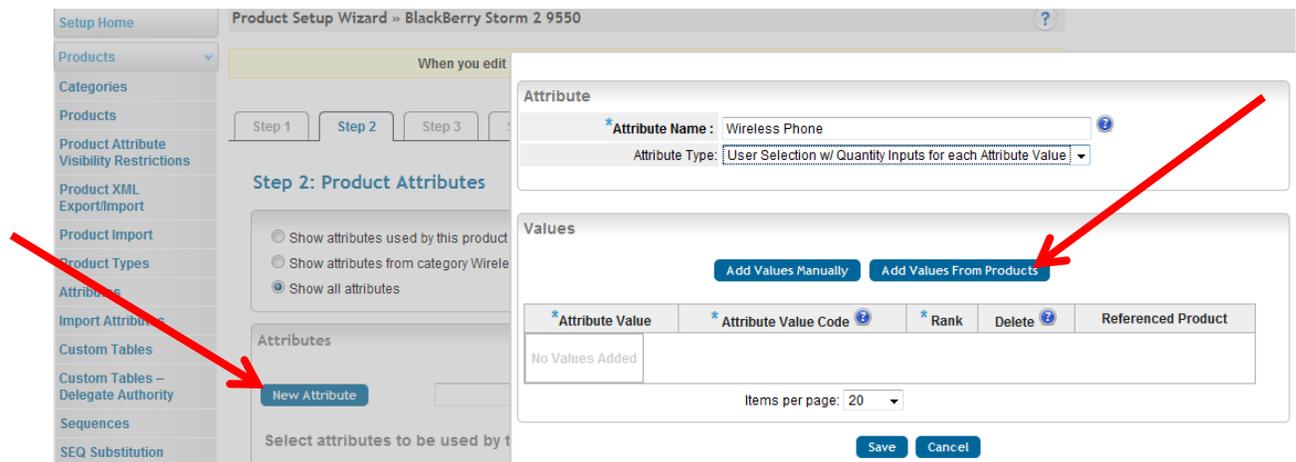
December 11th, 2010 –

Products as Line Items

Often, products have options, like carrying cases, batteries, support, etc. Attributes in CPQ are used to facilitate a user's selection of those options. This feature gives administrators the ability to create attribute values quickly from existing products in the catalog with a single click.

For example, a "Wireless Phone Selection" product with different phone "attributes".

We have the system loaded with 5 phone simple products. In this new "Wireless Phone Selection" product, we are adding a new attribute. Next, we name the attribute "Wireless Phone", then click on Add Values from Products.



Setup Home | Product Setup Wizard » BlackBerry Storm 2 9550

Products | Categories | Products | Product Attribute Visibility Restrictions | Product XML Export/Import | Product Import | Product Types | Attributes | Import Attributes | Custom Tables | Custom Tables – Delegate Authority | Sequences | SEQ Substitution

When you edit

Step 1 | Step 2 | Step 3

Step 2: Product Attributes

Show attributes used by this product
 Show attributes from category Wireless
 Show all attributes

Attributes

[New Attribute](#)

Select attributes to be used by t

Attribute

* Attribute Name: Wireless Phone

Attribute Type: User Selection w/ Quantity Inputs for each Attribute Value

Values

[Add Values Manually](#) [Add Values From Products](#)

* Attribute Value	* Attribute Value Code	* Rank	Delete	Referenced Product
No Values Added				

Items per page: 20

[Save](#) [Cancel](#)

Next, we click on the check boxes next to the phones we would like selectable as attributes and click on Add Selected Products.

Products

Search	Product Name	Part Number	Category
<input checked="" type="checkbox"/>	BlackBerry Storm 2 9550	BB99550	Wireless Phones
<input type="checkbox"/>	cmtest product		Clarence test
<input type="checkbox"/>	Desktop Monitor	HD-2104	Desktop Computers
<input checked="" type="checkbox"/>	Droid X	DR-X	Wireless Phones
<input type="checkbox"/>	HS Desktop		Desktop Computers
<input checked="" type="checkbox"/>	LG Octane	LG_Oct100	Wireless Phones
<input type="checkbox"/>	Microsoft Office XP	MOXP	Software
<input type="checkbox"/>	Microsoft SQL	SQL	Software
<input type="checkbox"/>	Microsoft Windows XP	WXP	Software
<input checked="" type="checkbox"/>	Motorola Devour	MOT100	Wireless Phones

1 2 Items per page: 10

Add Selected Products

Finally, we verify the information shown and click on Save.

Attribute

* Attribute Name : Wireless Phone

Attribute Type : User Selection w/ Quantity Inputs for each Attribute Value

Values

Add Values Manually **Add Values From Products**

* Attribute Value	* Attribute Value Code	* Rank	Delete	Referenced Product
Droid X	DR-X	10	<input type="checkbox"/>	Droid X
Motorola Devour	MOT100	20	<input type="checkbox"/>	Motorola Devour
BlackBerry Storm 2 9550	BB99550	30	<input type="checkbox"/>	BlackBerry Storm 2 9550
LG Octane	LG_Oct100	40	<input type="checkbox"/>	LG Octane

Items per page: 20

Save **Cancel**

Move to Step 3 of the PSW and edit the Wireless Phone attribute. Scroll to the bottom and select the referenced product for each attribute.

Select all values **Add Values Manually** **Add Values From Products**

	Value	Value Code	Rank	Default quantity (if not 1)	Add on price	Price	Part Number	Cost	Preselected	Reference Product
<input checked="" type="checkbox"/>	Motorola Devour	MOT100	0	0.0000	0.0000				<input type="checkbox"/>	Motorola D
<input checked="" type="checkbox"/>	Samsung Fascinate	SAMSFASC10	0	0.0000	0.0000				<input type="checkbox"/>	Samsung
<input checked="" type="checkbox"/>	Droid X	DR-X	10	0.0000	0.0000				<input type="checkbox"/>	Droid X
<input checked="" type="checkbox"/>	BlackBerry Storm 2 9550	BB99550	20	0.0000	0.0000				<input type="checkbox"/>	BlackBerry
<input checked="" type="checkbox"/>	LG Octane	LG_Oct100	30	0.0000	0.0000				<input type="checkbox"/>	LG Octane

Select Wireless Phone

Samsung Fascinate

Ask an Expert

Status: Complete!

Part Number:	
Price:	\$350.00
Wireless Phone:	Samsung Fascinate
Price:	\$350.00
Total Price:	\$350.00

Go and customize the “Wireless Phone Selection” product. We have now created a new Product with other Products as Line Items.

Improved Up-Selling and Cross-Selling

- Containers can now be populated with the data from a Guided Search
 - Selection called “Container will be used to present results of product search” should be checked when defining attribute as Container
 - Under section tab titled “Columns” option Product Part Number should be marked as column type
 - After container is filled, CPQ will go through all rows and verify that product with part number exists and that it is active
 - User can then be presented this option and will be able to select multiple rows to add to the cart

* Attribute Name :

Attribute Type: Container

Content | Columns | Properties | Actions | Validation

Use Products YES NO

Container will be used to present results of product search

Max Container Rows:

Min Container Rows:

SAVE

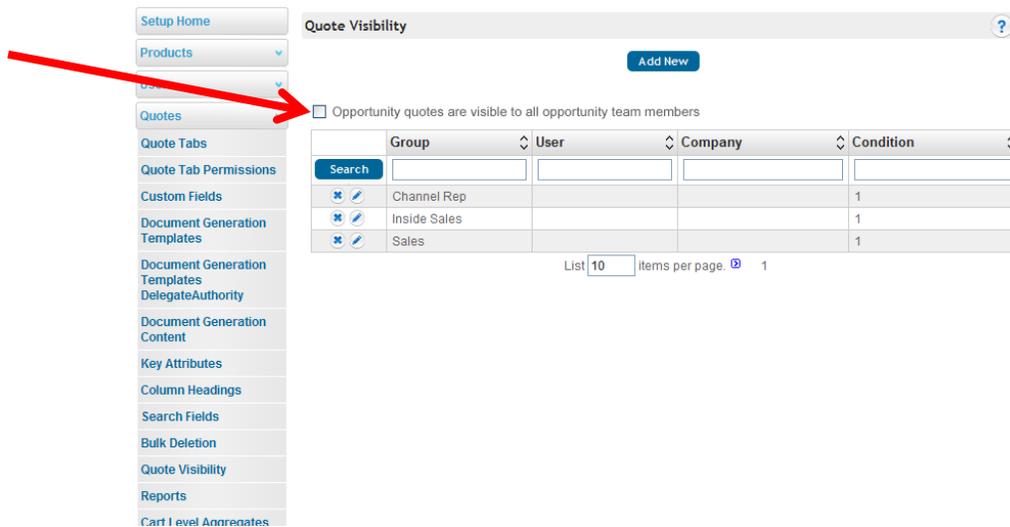
CRM OnDemand Sales Team Visibility

- In CPQ Setup -> Quotes -> Quote Visibility

Only when CRM is integrated with Siebel (COD), will the check box ‘Opportunity quotes are visible to all opportunity team members’ be displayed.

Sales Team members will be able to see the rest of their team’s quotes under the “Other Quotes” tab.

WebSource Setup



Quote Visibility

Opportunity quotes are visible to all opportunity team members

Search	Group	User	Company	Condition
	Channel Rep			1
	Inside Sales			1
	Sales			1

List 10 items per page. 1

New CTX Tags

<*CTX(Quote.CustomField(CustomFieldName).AttrValue)*>

<*CTX(Quote.CustomField(CustomFieldName).AttrValueCode)*>

Tag to get attribute value code and display value from a Quote Custom Field that is marked as 'Attribute' (drop down).

Please contact Webcom Customer Support for help with these or any other features.

[ResponsAbility](#)

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