

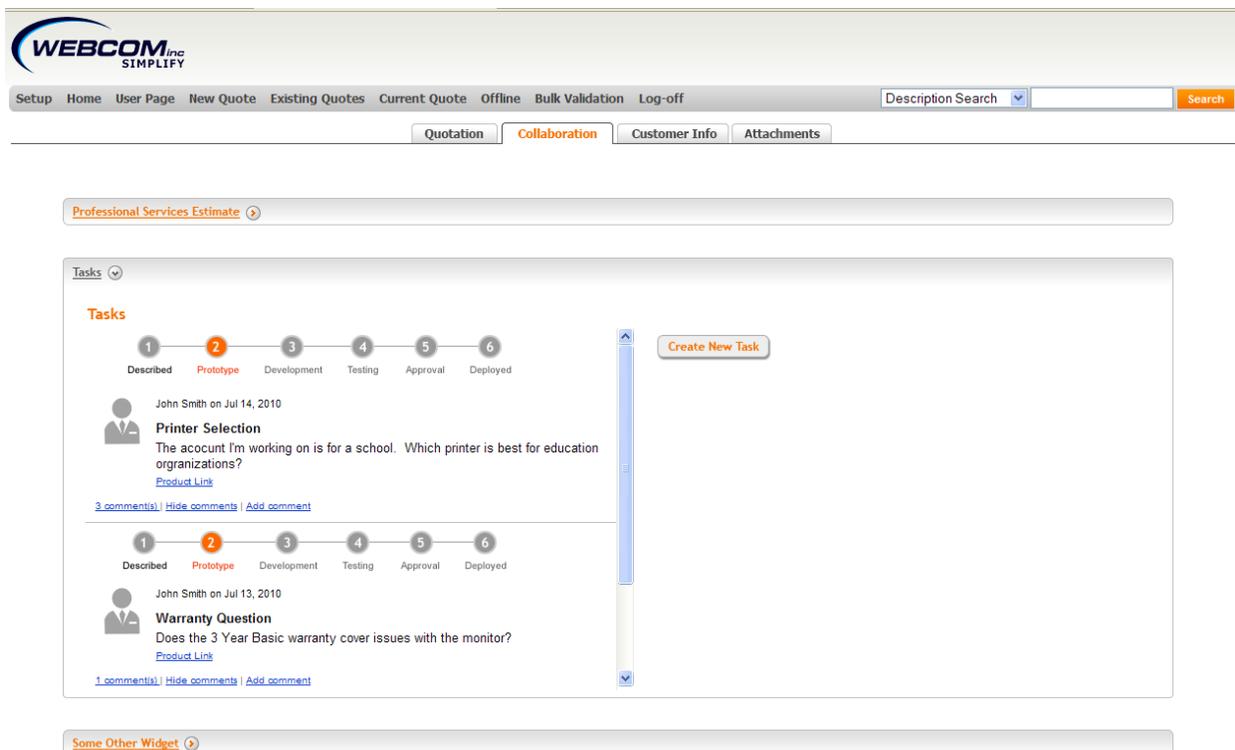
## WebSource CPQ v10

### CPQ v10 Release Notes

October 16<sup>th</sup>, 2010 –

### CPQ Collaboration Module

- Integration between CPQ and ResponsAbility allows the user to collaborate with others on the cart page. For example, if Steve Salesman has a question for Ed Engineer, he can create a new Ask an Expert case, assign him the question and all of the information is stored
- This integration consists of the ability to Ask an Expert in the configuration screen, Ask an Expert in the shopping cart and the ability to create Tasks in the Collaboration tab in the cart



The screenshot displays the WebSource CPQ v10 Collaboration Module interface. At the top, the Webcom Inc SIMPLIFY logo is visible. Below the logo is a navigation bar with the following items: Setup, Home, User Page, New Quote, Existing Quotes, Current Quote, Offline, Bulk Validation, Log-off, and a search box labeled "Description Search" with a "Search" button. Below the navigation bar are tabs for "Quotation", "Collaboration" (which is highlighted), "Customer Info", and "Attachments".

The main content area shows a "Professional Services Estimate" section with a dropdown arrow. Below this is a "Tasks" section with a dropdown arrow. The "Tasks" section contains two task entries, each with a progress bar and a "Create New Task" button. The first task is titled "Printer Selection" and was posted by John Smith on Jul 14, 2010. The question is "The account I'm working on is for a school. Which printer is best for education organizations?". The progress bar shows 6 steps: 1. Described, 2. Prototype (highlighted), 3. Development, 4. Testing, 5. Approval, and 6. Deployed. Below the question are links for "Product Link", "3 comment(s)", "Hide comments", and "Add comment". The second task is titled "Warranty Question" and was posted by John Smith on Jul 13, 2010. The question is "Does the 3 Year Basic warranty cover issues with the monitor?". The progress bar shows the same 6 steps. Below the question are links for "Product Link", "1 comment(s)", "Hide comments", and "Add comment".

At the bottom of the screenshot is a "Some Other Widget" section with a dropdown arrow.

Your order qualifies for Special Offers and Promotions!

Cart Info

Cart Actions

Products

Item#	Qty	Part Number	List Price	Extended List Price	Discount%	Discount Amount	Net Price	Extended Amount	Margin Health	Product Type	Actions
1	1	SMBS-P3-12-DR12T19	\$920.00	\$920.00	0.00	\$920.00	\$920.00	\$920.00	✓	Hardware	<input type="checkbox"/> optional <input type="checkbox"/> optional
Description: SMB2 Desktop Computer with Intel Pentium 3.0GHz Processor,1024MB-DDR2 Memory,500GB Hard Disc,DVD-R 12/4 Drive,TFT 17Inch Monitor											
2	1	MSOFF-2010	\$220.00	\$220.00	0.00	\$220.00	\$220.00	\$220.00	✗	Software	<input type="checkbox"/> optional <input type="checkbox"/> optional
Description: Microsoft Office Home and Business 2010 (Not Complete)											
2.1	1	MSVIS-2010	\$50.00	\$50.00	0.00	\$50.00	\$220.00	\$220.00	⊖	Software	<input type="checkbox"/> optional <input type="checkbox"/> optional
Description: Microsoft Visio 2010											

Optional Items

Product Types

Cart Comment

SubTotal and Total

Cart Actions

Approvals

Custom Fields

Discussion

**Ask An Expert**

1 Described 2 **Prototype** 3 Development 4 Testing 5 Approval 6 Deployed

John Smith on Jul 14, 2010

**Printer Selection**  
The account I'm working on is for a school. Which printer is best for education organizations?  
[Product Link](#)

2 comments | [Hide comments](#) | [Add comment](#)

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1 Described 2 **Prototype** 3 Development 4 Testing 5 Approval 6 Deployed

John Smith on Jul 13, 2010

**Warranty Question**  
Does the 3 Year Basic warranty cover issues with the monitor?  
[Product Link](#)

1 comment | [Hide comments](#) | [Add comment](#)

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1 Described 2 **Prototype** 3 Development 4 Testing 5 Approval 6 Deployed

John Smith on Jul 13, 2010

**Best monitor**  
Which monitor has the best quality?  
[Product Link](#)

1 comment | [Hide comments](#) | [Add comment](#)

## Local Administrators

- Main administrator can create local administrators that can manage their own users, templates and custom tables
- Users -> Users -> Edit -> User Level Administrative Privileges

## Allow API to Update Product

- Now you can allow your own web services software to maintain and upload data to CPQ

## Unlock Users in Offline Mode

- Administrators now have the capability to unlock users in offline mode if they have had their account locked due to failing the password check too many times
- In CPQ Setup -> Users -> Edit User and in User Page -> Administer Users, there will be a check box 'Unlock User In Offline'

## Audit Trail – Date Modified and Modified By

- Administrators now have the ability to see who updated any custom table and when

WebSource Administration

Table Name	Number of Columns	Number of Records	Date Modified	Modified by
aaaa	7	1776	12/7/10	JSmith
ActivitesTest	12	39998	25/3/10	Peter Parker
Anica	4	1	10/5/10	Clark Kent
anicaTest	2	0	18/8/10	Bruce Wayne
BojanaCT	8	19	12/7/10	JSmith
CTS_COUNTRY_SETTINGS	2	6	25/3/10	Peter Parker
CTS_EXTERNAL_PART_LIST	2	0	10/5/10	Clark Kent
CTS_PART_REPLACEMENT	2	1	18/8/10	Bruce Wayne
CTS_PGC_SETTINGS	2	0	12/7/10	JSmith
CTS_PRICE_CATEGORY_SETTINGS	2	0	25/3/10	Peter Parker

## Permission Groups

- Administrators can now create specific permissions/visibility groups for users
- CPQ Setup -> Users -> Permission Groups

### WebSource Administration

Search	Permission Group Name	Permission Group Type	Description	Members
	Acme	System Created		Acme
	Canadian Market	System Created		Canadian Market
	Channel Rep	System Created		Channel Rep
	Co_Name	System Created		Co_Name
	Company Webcomqa	System Created		Company Webcomqa
	CUSTOMER	System Created		CUSTOMER
	Customer Quote Acceptance	System Created		Customer Quote Acceptance
	Demo	System Created		Demo
	EMD	System Created		EMD
	European Market	System Created		European Market

1 2 3 4 Items per page: 10

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## Document Template Preview and Generate in .doc or .pdf

- Once a user generates a quote, they can select their template and decide between .doc and .pdf format if available. This replaces the drop down box that was previously in place.

Select Template [Add New Template](#)

Reseller Quote With Terms

Simple Quote PDF Preview

Simple Quote With Discounts

Simple Template in French Generate PDF

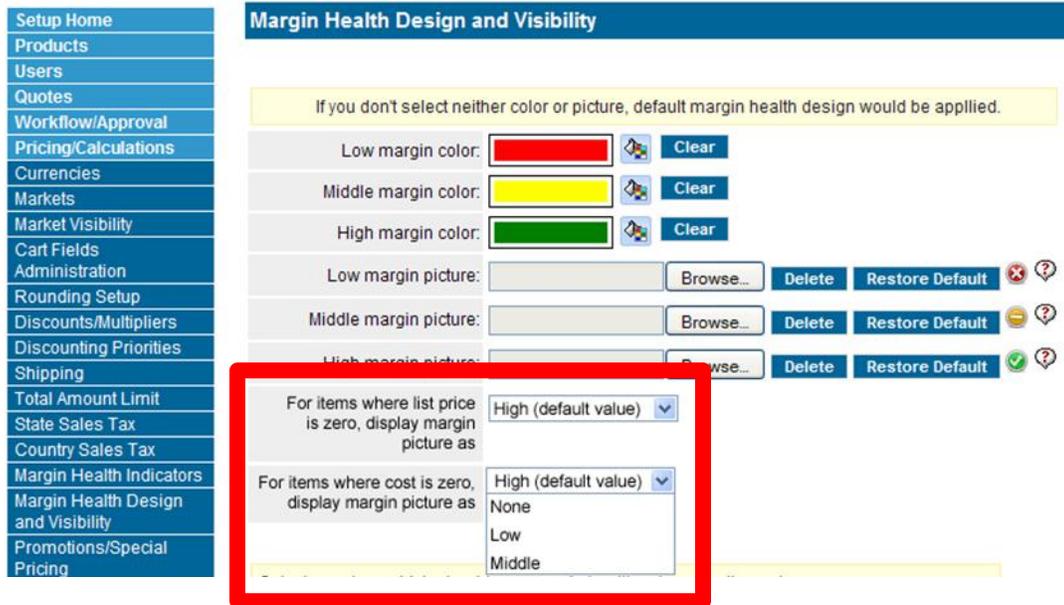
My Templates

Template for Acme

Doc for IBM Doc for IBM - This is description for this template.

## Margin Health Indicators

- The Margin Health slider has been updated to be more intuitive. Items where price and cost is 0 will now be displayed correctly and user is unable to move slider. Administrator can also decide which image to display



Setup Home  
Products  
Users  
Quotes  
Workflow/Approval  
Pricing/Calculations  
Currencies  
Markets  
Market Visibility  
Cart Fields  
Administration  
Rounding Setup  
Discounts/Multipliers  
Discounting Priorities  
Shipping  
Total Amount Limit  
State Sales Tax  
Country Sales Tax  
Margin Health Indicators  
Margin Health Design and Visibility  
Promotions/Special Pricing

### Margin Health Design and Visibility

If you don't select neither color or picture, default margin health design would be applied.

Low margin color:

Middle margin color:

High margin color:

Low margin picture:

Middle margin picture:

High margin picture:

For items where list price is zero, display margin picture as:

For items where cost is zero, display margin picture as:

- High (default value)
- None
- Low
- Middle



## Enhanced Language Tags

- New CTX tags have been developed to help support companies with multiple languages
- **Product Name Translated - CTX(Product.Name.Translated)**
- **Product Description Translated - CTX(Product.Description.Translated)**
- **Long Product Description Translated - CTX(Product.LongDescription.Translated)**
- **Product Quote Description Translated - CTX(Product.QuoteDescription.Translated)**
- **Attribute Value Translated - CTX(Product.Attribute(*Attribute Name*).Value.Translated)**
- **Attribute Label Translated - CTX(Product.Attribute(*Attribute Name*).Label.Translated)**
- **Attribute Description Translated - CTX(Product.Attribute(*Attribute Name*).Description.Translated)**
- **Attribute Value Description Translated - CTX(Product.Attribute(*Attribute Name*).ValueDescription(*Attribute Value*).Translated)**
- If the value is not found in current dictionary, value from default dictionary will be returned.

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

[ResponsAbility](#)

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