

WebSource CPQ v11

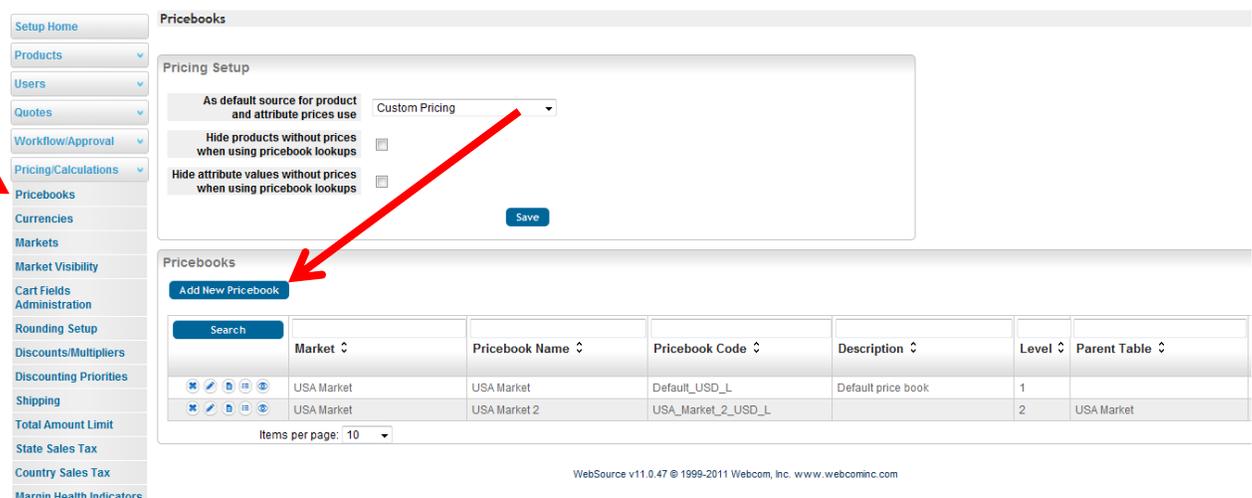
CPQ v11 Release Notes

January 15th, 2011 –

Pricebooks

Pricebooks implemented in this version give the ability to maintain prices for various markets in pricing tables, similar to custom tables. The main advantage of using these built in price books is the speed of looking up prices. You can maintain these books manually, through Excel or through API.

Price books are located under Setup -> Pricing/Calculations -> Pricebooks



The screenshot displays the 'Pricebooks' configuration page. On the left is a navigation menu with 'Pricebooks' selected. The main area is divided into two sections: 'Pricing Setup' and 'Pricebooks'.

Pricing Setup:

- As default source for product and attribute prices use: Custom Pricing
- Hide products without prices when using pricebook lookups:
- Hide attribute values without prices when using pricebook lookups:
- Save button

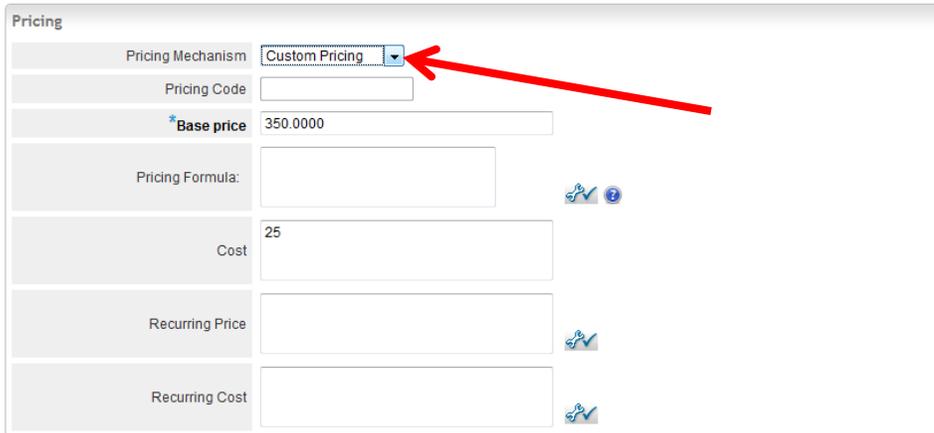
Pricebooks Table:

Market	Pricebook Name	Pricebook Code	Description	Level	Parent Table
USA Market	USA Market	Default_USD_L	Default price book	1	
USA Market	USA Market 2	USA_Market_2_USD_L		2	USA Market

Items per page: 10

Administrator can choose default pricing between custom pricing or through price books. Each price book also can have a parent/child relationship if you select the same market.

Also, PSW Step 1 has changed to reflect how pricing works. Under the Pricing section, administrators can choose between custom pricing or through price books.



Pricing	
Pricing Mechanism	Custom Pricing
Pricing Code	
*Base price	350.0000
Pricing Formula:	
Cost	25
Recurring Price	
Recurring Cost	

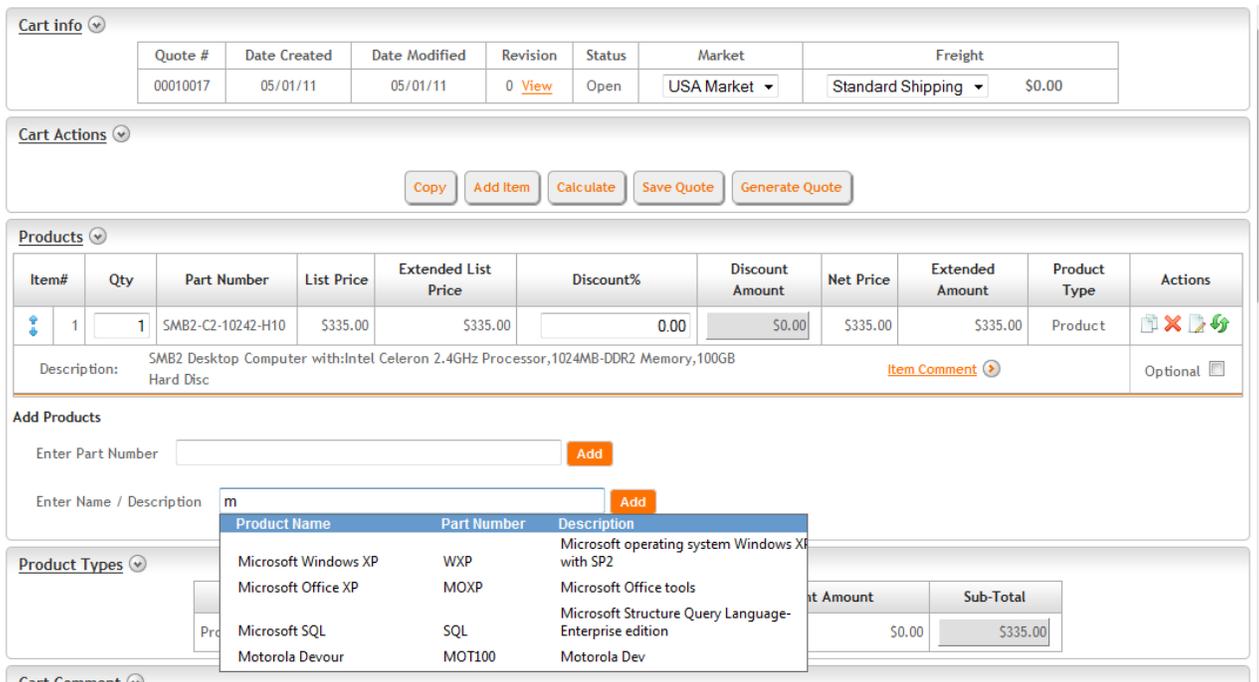
Product Import also has a new column called “Pricing Mechanism” and the two valid options are Pricebook Lookup or Custom Pricing.

While using pricebook lookup, when a user goes to select a product, it looks at the most recent valid price book (falls within affectivity dates). If it does not find a price there, it goes to the parent. If that part number is not in that price book, it moves up another level, etc. This way, administrators can create multiple price books based off a single, default price book.

Fast Add/Edit Product in Cart

Ajax lookups have been added to the Cart page that will allow users to be able to rapidly add products if they know the part number or description. Currently, you are only able to add simple products. There are new application parameters under Shopping Cart section that may need to be turned on to enable this. (Enable product search by part number, description, etc.)

Add:



The screenshot displays the 'Cart info' section with a table of cart details:

Quote #	Date Created	Date Modified	Revision	Status	Market	Freight
00010017	05/01/11	05/01/11	0 View	Open	USA Market	Standard Shipping \$0.00

Below this is the 'Cart Actions' section with buttons for Copy, Add Item, Calculate, Save Quote, and Generate Quote.

The 'Products' section contains a table with the following data:

Item#	Qty	Part Number	List Price	Extended List Price	Discount%	Discount Amount	Net Price	Extended Amount	Product Type	Actions
1	1	SMB2-C2-10242-H10	\$335.00	\$335.00	0.00	\$0.00	\$335.00	\$335.00	Product	Item Comment

The description for the product is: SMB2 Desktop Computer with: Intel Celeron 2.4GHz Processor, 1024MB-DDR2 Memory, 100GB Hard Disc. An 'Optional' checkbox is present.

The 'Add Products' section includes input fields for 'Enter Part Number' and 'Enter Name / Description'. A search dropdown is open, showing results:

Product Name	Part Number	Description
Microsoft Windows XP	WXP	Microsoft operating system Windows XP with SP2
Microsoft Office XP	MOXP	Microsoft Office tools
Microsoft SQL	SQL	Microsoft Structure Query Language-Enterprise edition
Motorola Devour	MOT100	Motorola Dev

At the bottom right, a summary table shows:

Amount	Sub-Total
\$0.00	\$335.00

Users are also able to edit Part Numbers and click on "Replace Items" to be able to quickly interchange Products. The Replace Items action must be added to the workflow. If needed, please contact Webcom for assistance with setting this up.

Edit:

Cart Actions ▼

Products ▼

Item#	Qty	Part Number	List Price	Extended List Price	Discount%	Discount Amount	Net Price	Extended Amount	Product Type	Actions
1	1	SMB2-A3-512-H16	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	Hardware	
Description: SMB2 Desktop Computer with:AMD Athlon 3000+ Processor,512MB-DDR Memory,160GB Hard Disc Item Comment										
2	1	-A3	\$80.00	\$80.00	0.00%	\$0.00	\$80.00	\$80.00	Hardware	
Description: AMD Athlon 3000+										
3	1	-H16	\$140.00	\$140.00	0.00%	\$0.00	\$140.00	\$140.00	Hardware	
Description: 160GB										
4	1	-512	\$60.00	\$60.00	0.00%	\$0.00	\$60.00	\$60.00	Hardware	
Description: 512MB-DDR										

Cart Actions ▼

Products ▼

Item#	Qty	Part Number	List Price	Extended List Price	Discount%	Discount Amount	Net Price	Extended Amount	Product Type	Actions
1	1	SMB2-A3-1024-H16	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	Hardware	
Description: SMB2 Desktop Computer with:AMD Athlon 3000+ Processor,512MB-DDR Memory,160GB Hard Disc Item Comment										
2	1	-A3	\$80.00	\$80.00	0.00%	\$0.00	\$80.00	\$80.00	Hardware	
Description: AMD Athlon 3000+										
3	1	-H16	\$140.00	\$140.00	0.00%	\$0.00	\$140.00	\$140.00	Hardware	
Description: 160GB										
4	1	-512	\$60.00	\$60.00	0.00%	\$0.00	\$60.00	\$60.00	Hardware	
Description: 512MB-DDR										

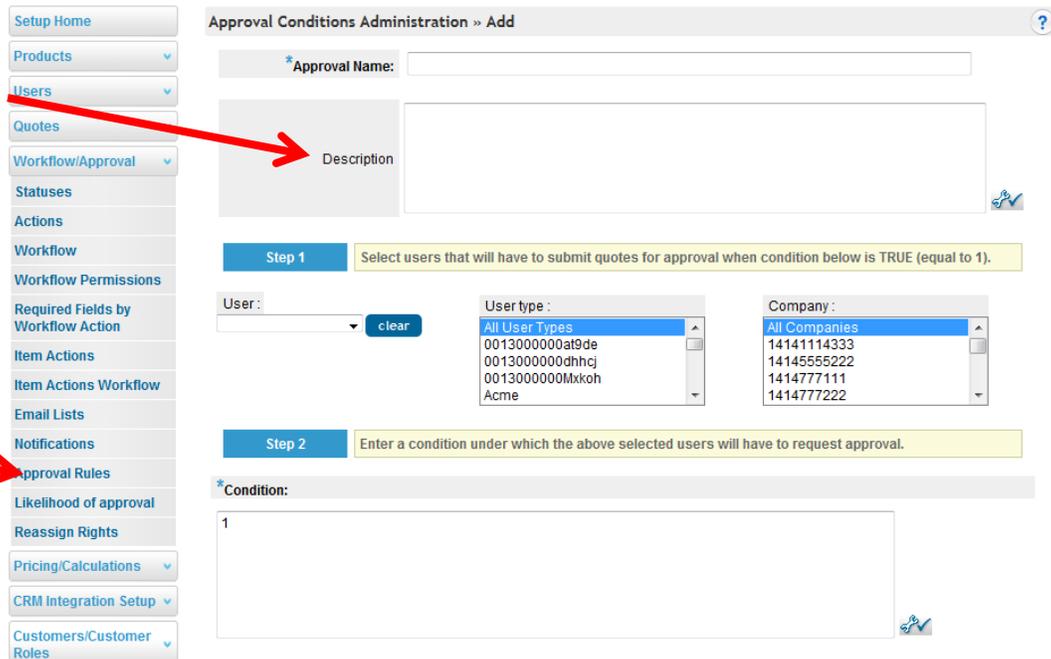
Cart Actions ▼

Products ▼

Item#	Qty	Part Number	List Price	Extended List Price	Discount%	Discount Amount	Net Price	Extended Amount	Product Type	Actions
1	1	SMB2-A3-1024-H16	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	Hardware	
Description: SMB2 Desktop Computer with:AMD Athlon 3000+ Processor,1024MB-DDR Memory,160GB Hard Disc Item Comment										
2	1	-A3	\$80.00	\$80.00	0.00%	\$0.00	\$80.00	\$80.00	Hardware	
Description: AMD Athlon 3000+										
3	1	-H16	\$140.00	\$140.00	0.00%	\$0.00	\$140.00	\$140.00	Hardware	
Description: 160GB										
4	1	-1024	\$110.00	\$110.00	0.00%	\$0.00	\$110.00	\$110.00	Hardware	
Description: 1024MB-DDR										

Approval Enhancement

Approvals now have a description field that gets displayed to user when they violate an approval rule. This allows administrators to be more descriptive about why a quote needs approval.



Setup Home

Products

Users

Quotes

Workflow/Approval

Statuses

Actions

Workflow

Workflow Permissions

Required Fields by Workflow Action

Item Actions

Item Actions Workflow

Email Lists

Notifications

Approval Rules

Likelihood of approval

Reassign Rights

Pricing/Calculations

CRM Integration Setup

Customers/Customer Roles

Approval Conditions Administration » Add

*Approval Name:

Description

Step 1 Select users that will have to submit quotes for approval when condition below is TRUE (equal to 1).

User:

User type:

Company:

Step 2 Enter a condition under which the above selected users will have to request approval.

*Condition:

Alternative Configurations

This release gives users the ability to create alternative configurations. As opposed to optional items, where the item can be added at the end for an extra price (warranties, batteries, etc), alternative configurations allow the user to create multiple different configurations based on the same base product.

For example, a user can now quote a Laptop with 1 GB of ram and then create two alternatives with 2 GB and 3 GB (that do not affect the total price in the cart) that can be displayed in a quote template. In addition, then optional items like warranties and batteries can be added.

Please contact Webcom if you are interested in using this functionality and we can enable this in your tenant.



API: CRM - CPQ User Mappings

There is now the ability to map CRM and CPQ users through API in addition to manually setting the link. For clients with a significant amount of users, this will save a lot of time. If you are interested, please contact Webcom to get this set up in your tenant.

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

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