



User Manual

HP Integrated Quoting for Resellers

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For best results, please
view in Full Screen mode



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What is HP Integrated Quoting?

Integrated Quoting is a seamless end-to-end process that enables Opportunity creation, Deal Registration, and Quoting through the Partner Portal. It offers a consistent, standardized, and streamlined experience to deliver value and easy-to-understand criteria.

This capability replaces the Deal Registration Portal (DRP) and Smart Quote, for registering deals and requesting special pricing. When deployed, all new Deal and Quotes may only be created using this capability.

Benefits:

- Integrated environment, reducing the need for duplicate data entry
- Self-service quoting offering instant pricing (where eligible)
- Improved price setting calculation for more market relevant pricing
- OPG generation

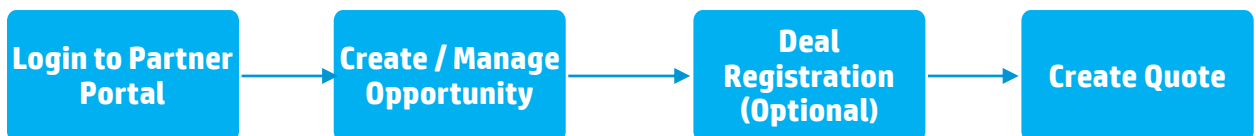
There are multiple pathways you can take through the Integrated Quoting Process.

- After creating the Opportunity and adding a Distributor, you can go straight to creating a quote, or if eligible, you may also register a deal for program benefits before proceeding to create a quote.

Basic Path:



Extended Path with Optional Deal Registration:





Section 1

Main Processes



Log In to Portal



Log in to Portal, Navigate to Integrated Quoting



HP Unison Partner Portal Overview:

- The HP Unison Partner Portal is the entry point to the HP Unison Platform. Available 24x7 from desktop or mobile, you can get easy access to the information you want, when you want it.
- This means Quick and easy access to everything you need from HP, all in one place.

Topics Covered In This Section:

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Log In to Portal - UPP



Log in to the Unison Partner Portal

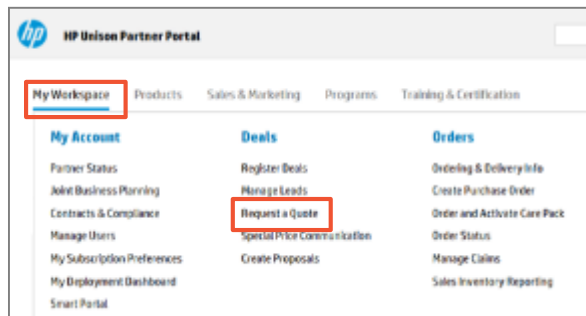
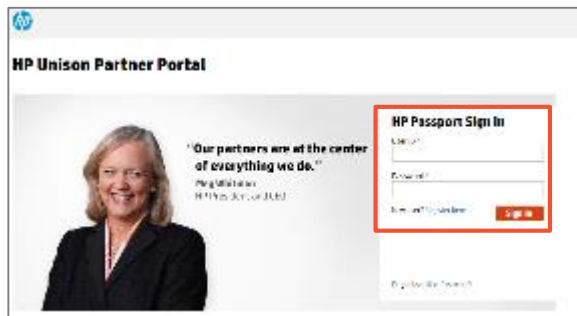
Link to Unison Partner Portal

<https://partner.hp.com/group/upp-emea/>

Direct Link to Integrated Quoting

<https://partner.hp.com/group/upp-emea/quoting>

Log in to the Portal → My Workspace → Request a Quote



Go On the Landing page, select the Integrated Quoting Tool hyperlink to see supporting documents, or the **Go** button to access the tool.

Request Access If you do not have access, you will see the **Request Access Button**. If you did not complete the training, take the 20 minute **Web Based Module** found in the Supporting Materials section



Supporting documents



Enter the date you were trained, select how you were trained, and click the **Submit Button**



Your access will be granted approximately **24 hours** after submitting



Log In to Portal - UPP



Add Integrated Quoting to Dashboard (Optional)

A short-cut to the Integrated Quoting Tool may be added to the “My Dashboard” on the Portal homepage

- 1 Click the **Customer your Dashboard** link

HP Unison Partner Portal

My Workspace Products Sales & Marketing Programs Training & Certification

Welcome to the new Partner Portal
A better sales experience starts here. The launch of the HP Unison Partner Portal is your invitation to a more collaborative engagement with HP.

[Give feedback](#)

PartnerOne status: Platinum

My notifications:

- Your FY15 partner status [Go](#)
- HP UPP Training [Go](#)
- Connect with HP Blogs [Go](#)

My Dashboard 1 Customize your Dashboard

- 2 Select **Integrated Quoting Tool** and any other capabilities you wish from the list of applications
- 3 After closing the list of applications, the selected capabilities will appear as a short-cut in the “My Dashboard” section. They may be dragged and dropped into different positions within the section.

Customize your Dashboard

Search applications (searches as you type).

- Benefits and rewards +
- Configuration tools +
- Deals -
 - Deal Registration Add
 - Smart Quote Add
 - Integrated Quoting Tool 2 Add
- Orders +
- Products +
- Programs +
- Sales and marketing +
- Training and certification +

HP Unison Partner Portal

My Workspace Products Sales & Marketing Programs Training & Certification

HP Co-Marketing Zone
Create your personalized HP co-marketing assets for lead.

[Access Now](#)

PartnerOne status: Platinum

My notifications:

- Your FY15 partner status [Go](#)
- HP UPP Training [Go](#)
- Connect with HP Blogs [Go](#)

My Dashboard Customize your Dashboard

Integrated Quoting Tool

Easily create and manage your special pricing quotes.

3

[Go to](#)

Special Price Communication

The Special Price Communicator or pComm, provides a single communication platform for special local, regional and global prices.

[Go to](#)

Advanced Iris Configurator

The Iris application is a stand-alone, file-based, internet-enabled system configuration and quoting tool.

Iris is used for the design and quoting of complex multi-vendor systems.

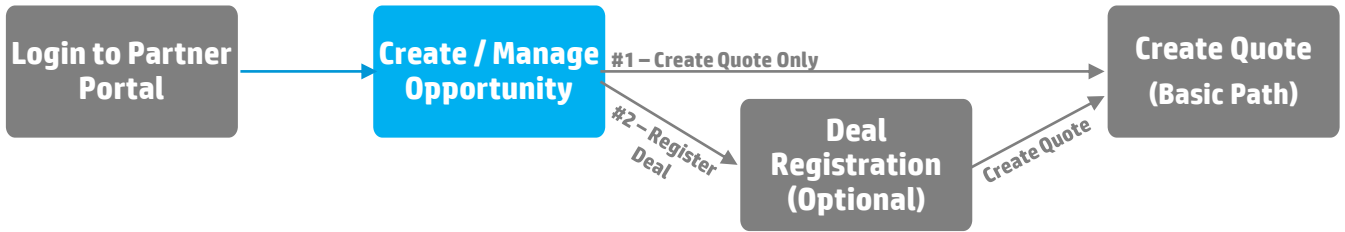
[Go to](#)



Create an Opportunity



Create an Opportunity



Opportunity Overview:

- Creating an Opportunity is the first step in the Integrated Quoting process. The opportunity may be created by HP and shared with you, or you can create it yourself. Once an opportunity is created, a Quote request and a Deal Registration request (optional) may be added to the Opportunity.
- In order to complete a Quote request or a Deal Registration, a Distributor must be added to the Opportunity.
- The other sections of the Opportunity screen are optional “extended options”.
- The Opportunity should be updated as needed, for example, to manage the Close Date if it changes.

Topics Covered In This Section:

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After clicking the “Go” button for Integrated Quoting in the Portal, you will land on the Opportunities Tab of Salesforce.com

Find / Edit an Existing Opportunity

- To start the Integrated Quoting process, navigate to the **Opportunities** tab
- The Expand/Collapse symbol will show / hide the left hand nave bar containing the search field.
- To search for an Opportunity Name, enter a text string and click the **Go** button
- All column headers may be used to **sort the list** A to Z or Z to A.
- To edit a n existing Opportunity, click **Opportunity Name** hyperlink. Using the Edit button will only enable edits on the header level information.

The screenshot shows the Salesforce Opportunities tab. Callout 1 points to the 'Opportunities' tab in the navigation bar. Callout 2 points to the expand/collapse icon for the left sidebar. Callout 3 points to the search input field and 'Go' button. Callout 4 points to the 'Account Name' column header in the table. Callout 5 points to the 'Q4 Server Refresh' opportunity name in the table.

Action	Opportunity Name	Opportunity Record Type	Account Name	Total Opportunity Value
Edit	Q4 Server Refresh	Partner Deal	INDUSTEX SL	EUR 0.00
Edit	XX Demo Atr 20 Oct	Partner Deal	CEMEX LATAM HOLDINGS SA	EUR 0.00
Edit	XX Test Cancom 23.102014 Training	Standard	Nordex SE	EUR 0.00
Edit	XX WW NextGen. R10. CC	Partner Deal	CEMEX LATAM HOLDINGS SA	EUR 0.00
Edit	XX WW NEXTGEN R10.0 copaco 2	Standard	Test Account	EUR 0.00
Edit	XX WW Nextgen R10.0-JJM test 4	Partner Deal	ZODIAC	EUR 0.00
Edit	xx WW NEXTGEN R10.0 Refresh 22 Oct	Standard	CEMEX LATAM HOLDINGS SA	EUR 0.00
Edit	XX WW NEXTGEN R10.0 Refresh 22 Oct 2	Partner Deal	CEMEX LATAM HOLDINGS SA	EUR 0.00

Manage an HP Assigned Opportunity

Creating an Opportunity is the first step for both Deal Registration and Quoting. The Opportunity may be created by HP and assigned to you, or you can create a New Opportunity yourself.

- If HP has created an opportunity and transferred ownership to you, you will see it on the **Home** tab under Acknowledge Opportunities.
- Click the **Acknowledge** button to accept ownership.
- The Opportunity will then appear in the Opportunities list. Some information will already be populated by HP. Add any missing information, and use this opportunity to complete any Deal Registrations or Quote requests.

The screenshot shows the 'Acknowledge Opportunities' section. Callout 1 points to the 'Acknowledge' button in the table.

Action	Opportunity Name	Account Name	Total Opportunity Value	Close Date	Sales Stage
Acknowledge	Test Oppty	* Test Company for all tests	USD 1.00 (EUR 0.80)	31/12/2014	01 - Understand Customer



Create an Opportunity – Add Customer



Creating an Opportunity is the first step for both Deal Registration and Quoting. If the Opportunity has not already been set up by HP, create a New Opportunity.

Create New Opportunity

From the **Opportunities Tab**, Select the **New Opportunity Button**.

This button may also be accessed from the **Deal Registration Tab**.

Customer Search and Selection

- 1 Click the **Recent Customers** button to view and select from the last 10 Customers added to an Opportunity, or follow the next steps to search for a customer.
- 2 Enter **Customer Name** – Add City, Tax ID, Zip/Postal Code, or State/Province to refine the search if needed.
- 3 Click **Search** to see the top search results. These results will at Customer Headquarters / Purchasing Site level. All columns may be sorted by clicking the column name.
- 4 If you cannot find the Customer, click the **Expand Search** button – this will expand the search to include customer locations.
- 5 If you still cannot find your customer, use the **Create a New Customer** link. Verifying a new customer will incur additional processing time. You may still proceed with your quote, but final pricing will not be provided until the customer has been validated by HP.

Customer Name	Non-Latin Name	Street	City	State/Province	Zip/PostalCode	Country	Tax Id
HP		AVDA GRAELLS, 501	SANT CUGAT	BARCELONA	08174	Spain	
HP		ANTONIO MACHADO 50	CASTELDEFELS	BARCELONA	8860	Spain	
HP ES		AV GRAELLS, 501	SANT CUGAT DEL VALLES	BARCELONA	8190	Spain	
HP ES		CROSELLON, 515	BARCELONA	BARCELONA	08025	Spain	



HP Outsourcing España	AVENIDA GENERALITAT 163-167	SANT CUGAT DEL VALLES	BARCELONA	08174
MOBILIARIO HP -2013 SL	CALLE GUILLEM SANTACILIA, 12 - BJ	ELX	ALICANTE	03200
HP PIÑERO SL	CALLE SANTISSIM CRIST DE LA FE, 24 - BJ	PATERNA	VALENCIA	46980
HP SPORT CONSULTING SL	AVENIDA DE LA DEHESA, 2 - CH 37	SAN SEBASTIAN DE LOS REYES	MADRID	28700
HP METALISTERIA SC	RONDA DE LA INDUSTRIA 1	HUESCA	HUESCA	22000
HP SPORT CONSULTING SL	CALLE ROSALIA DE CASTRO 9	SAN SEBASTIAN DE LOS REYES	MADRID	28700

If you have not found your customer, please click on 'Create a new Customer'

[Create a New Customer](#)

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Create an Opportunity – Header Data



Add Header Information

- 1 Enter **Opportunity Name**. The name may not contain any of the following characters: \ / : * ? " < > |. Enter a meaningful Opportunity Name that will enable you to find the Opportunity later, such as .
- 2 Enter realistic **Close Date** (eg., first shipment date), and keep this field updated when if the date changes. This date can be updated as needed.
- 3 **Sales Stage** is automatically updated as you proceed through the request. If the deal is lost, change the status to "Lost", otherwise leave as is.
- 4 **Currency** defaults to local currency.
- 5 **Save** the header information when completed.

Opportunity Edit
New Opportunity

Opportunity Edit 5 Save Save & New Cancel

Opportunity Information ! = Required Information

Opportunity Owner BMI RES DEMO EN 1
Account Name HP CONSULTING
Opportunity Name 1
Opportunity Description
Managed By

Close Date 2 [05/11/2014]
Sales Stage 3 01 - Understand Customer
Won/Lost Reason --None--
Customer Budget Amount

Currency 4 EUR - Euro

Additional Information

Customer Contact First Name Customer Contact Last Name
Customer Telephone Number Customer Email Address

System Information

Last Modified by Partner Partner Assigned Date

Save Save & New Cancel

Update Header Information (Close Date, Sales Stage)

- 1 To edit the Close Date or Sales Stage, click the Edit button on the Opportunity
- 2 Update the Close Date by clicking the Close Date field and selecting a new date from the calendar
- 3 If the deal has been lost, change the Sales Stage to Lost, by using the drop down list

Opportunity Detail 1 Edit Engage HP Financial Services Deal Registration Steps

HP Opportunity Id OPP-0003648146 Close Date 28/02/2015
Opportunity Owner BMI RES DEMO EN 1 [Change] Sales Stage 01 - Understand Customer
Account Name HP CONSULTING Won/Lost Reason
Opportunity Name Q1 Server Refresh Total Opportunity Value EUR 0.00
Opportunity Description Customer Budget Amount
Managed By Partner
Reseller Company ES System Validation Account RES

Close Date 2 [15/12/2014]
Sales Stage
Won/Lost Reason
Customer Budget Amount
Currency

Calendar: February 2015
28

Close Date [15/12/2014]
Sales Stage 3 01 - Understand Customer
Won/Lost Reason
Customer Budget Amount
Currency

Lost

The Opportunity Detail Screen



Sections of the Opportunity Detail Screen

Products (Products & Services) | Addresses | Competitors | Sales Process Linkage | Open Activities

Opportunity Detail [Edit] [Engage HP Financial Services] [Deal Registration]

HP Opportunity Id: OPP-0003648146
 Opportunity Owner: BMI RES DEMO EN 1 [Change]
 Account Name: HP CONSULTING
 Opportunity Name: Q1 Server Refresh
 Opportunity Description: Partner
 Reseller Company: ES System Validation Account RES

Additional Information
 Customer Contact First Name: Customer Contact L
 Customer Telephone Number: Customer Email

Sales Team By BG
 Select Business Group to view the members: All
 Add
 No sales team members for selected business group

System Information
 Created By: BMI RES DEMO EN 1, 15/12/2014 10:45
 Last Modified by Partner: 15/12/2014 10:57

Contact Role
 Contact Name: Account Name: Email

Selected Email Boxes [Add Reseller's Team Email]

Action	Contact Name	Email Box Address

HP Quotes [Create Quote] [Show Previous Versions] [Hide] [Show]
 No records to display

Alliance And Channel Partner [Add Distributor] [Add Contacts]

Action	Partner Name	Business Relationship

Products (Products & Services) [Sort] [Product FAQ] [Manage Products & Services]
 No records to display

Addresses [Add Location]
 No records to display

Competitors [New]
 No records to display

Sales Process Linkage [New Sales Process Linkage]
 No records to display

Open Activities [New Task]
 No records to display

Activity History [Log a Call]
 No records to display

Notes & Attachments [New Note] [Attach File]
 No records to display

Stage History

Sales Stage	Total Opportunity Value	Expected Revenue	Close Date
01 - Understand Customer	EUR 0.00	EUR 0.00	28/02/2014

Opportunity Detail Section

- Click the **Edit** button to update information in the Opportunity header.
- View the HP Account Team by clicking the **Account Name**.

Sales Team by BG Section

- If you are the owner of the oppty, you can give other users Read or Read/Write access to the Opportunity and associated Deal Registrations and Quotes. From the **Sales Team By BG** section click the **Add** button.

System Information Section

- This segment indicates the creation and **modifications performed** for the opportunity.

Add Reseller's Team Email Section

- In this section you can **add the reseller's team email**, if applicable.

HP Quotes Section

- This section contains the **Create Quote** button, used to create a new quote, shows the existing quotes for that opportunity.

Alliance and Channel Partner Section

- Used to **add Distributor(s)** for Deal Registration and quoting.

Products & Services Section

- Section used to create a new **Deal Registration**. Start the process by selecting the **Manage Products & Services** button.
- Add Product Lines using the search icon, and add the quantity and unit price. Click the Add button to add the details.
- Use the Apply Programs button to select a program and request a Deal Registration (for example, Pfg).

Addresses and Competitors Sections

- In these sections you can add relevant **addresses and competitors** for this opportunity.

Sales Process Linkage

- Sales Process Linkage is a feature that allows you to **associate record IDs from other opportunities** and tools with your opportunity.
- Select what you would like to associate with your opportunity from the ID Type column, for example, for a mixed BG Opportunity, you can add the Opportunity ID of associated Opportunities.

Open Activities and Activity History Sections

- In the Open Activities section you can **create and assign activities** relevant to the Opportunity. Once complete, these activities move into the Activity History Section.

Notes & Attachments Section

- This section enables you to **add private or public notes**, as well as attachments relevant to the Opportunity.



Create an Opportunity – Core Data



Add a Distributor

- 1 Select **Add Distributor** in the Alliance and Channel Partner Section. If you will be doing a Deal Registration containing EG products, select only 1 Distributor.
- 2 Select the **Search** icon to see selectable Distributors
- 3 Select the distributor you wish to add by clicking the **Add Distributor** button

Account Search

Search

Help Search will locate partners based on information on Account, Alternate N

Locator ID	Account Name
40675089	CIADAM B.V.
40388054	ADVEO DIGITAL SYSTEMS S.A.U
40401270	ARROW ENTERPRISE COMPUTING SOLUTIONS SA.
1000000810	ES DUMMY AB
1000000814	ES DUMMY CO
1000000815	ES DUMMY IB

Important Notes:

- **In selected countries**, only 1 distributor may be added. If this applies to you, and if you have added more than 1 distributor to the Opportunity, you will see a message when you click the Get Price button. This message will direct you to go to the Partners Tab, and select 1 distributor for the quote.
- **Direct Purchasing Resellers:** If you are acting as both Reseller and Distributor for the deal, please select the special distributor name that has been set up for you.
- **Partners in Nordics:** you may be required to add not only the Distributor in your country, but also the Distribution Hub of the Distributor Headquarters.

Add Distributor Contacts

- 1 Search for Distributor Contacts using the **Search Contacts** button - this will enable automated email notifications to the selected contact(s)
- 2 Select the desired contact(s) and click the **Save** button

*Note - The contact selected will be given visibility to the opportunity details and any deal registrations.

Partner Account

Select	Username	E-mail
<input type="checkbox"/>	Validation BMI ES_DIS_A_01	validation_es_dis_a_01@transformq2c.com
<input type="checkbox"/>	Validation BMI ES_DIS_A_02	validation_es_dis_a_02@transformq2c.com
<input type="checkbox"/>	BMI DIS DEMO GE 1	dis_demo_ge_1_bmi@mailinator.com
<input type="checkbox"/>	BMI DIS DEMO GE 2	dis_demo_ge_2_bmi@mailinator.com
<input type="checkbox"/>	BMI DIS DEMO EN 1	dis_demo_en_1_bmi@mailinator.com

Change / Remove Distributor

- 4 To change Distributors, remove a Distributor by clicking the Delete button, and add Distributors using the process above. The Distributor may be changed at any time before accepting the Quote. Be sure to access the Quote again after the change is made, to ensure the information is updated in the Quote. If the price has already been accepted (quote created), a second version of the deal will be generated automatically.

Alliance And Channel Partner

Action	Partner Name	Business Relationship	Location Name
Delete 4	ES System Validation Account DIS	Commercial Distributor	ES System Validation Account DIS



Opportunities – Extended Options



Login → Opportunity → Register Deal (Optional) → Build Quote → Get Price → Accept Price → Generate Quote → Accept Quote → OPG Created

Most commonly used sections in the Opportunity Screen – these sections are optional

View Customer Account Team

To view the account team for the end customer, click the **Account Name** hyperlink (note: not all accounts will contain Account Information)

Opportunity Detail Edit

HP Opportunity Id OPP-0003011011

Opportunity Owner BMI RES DEMO EN 1 [\[Change\]](#)

Account Name [CUSTOMER XYZ](#)

Account Team View

User Name	User Email	Territory Country
John Smith	John.smith@hp.com	ES

Grant Access to Another User

- To grant read or read/write access to a user, select the **Add** button in the Sales Team by BG section
- Select the **User Type** (Partner User for a user in your company, User for an HP User)
- Use the Search Icon to find eligible names to add, select by clicking the **Full Name** hyperlink
- Grant **Read Only** or **Read/Write Access** and add **Team Role**

Sales Team By BG

No sales team members for selected business group

Add

Sales Team Members Save Save & More Cancel

User Type	Search	Opportunity Access	Team Role
Partner User	<input type="text"/>	Read Only	--None--
user	<input type="text"/>	Read Only	--None--
user	<input type="text"/>		
user	<input type="text"/>		
user	<input type="text"/>		

Full Name | **E-mail** | **Business Group** | **UserRole**

Validation BMI ES RES A 01		ES System Validation Account RES Partner User
TEST USER BMI SPARE		ES System Validation Account RES Partner User
BMI RES DEMO EN 2		ES System Validation Account RES Partner User

This is particularly useful if you are collaborating with a colleague or want to grant access to your holiday backup.

Add Team Email Box

- To add a team email address for receiving notifications, select the **Add Reseller's Team Email** button
- Search for the address by using the **Search** icon
- Select and add the address from the list
- If the address is not found, add it into the system by using the **Create Team Email Box** option

Selected Email Boxes **Add Reseller's Team Email**

Action	Contact Name

Add Email Box

Team Email Address:

Save Cancel

Email Address

- validation_es_res_a_02@transformq2c.com
- horatiu.toparceanu@hp.com
- marketa.zavazalova@hp.com
- annette.michelsen@hp.com
- diana.gruschinczky@hp.com
- wim.marbus@hp.com

Add

Create Team Email Box



Opportunities – Extended Options



Most commonly used sections in the Opportunity Screen – these sections are optional

Sales Process Linkage

This section allows other Salesforce.com records to be associated to the Opportunity. For example, for a mixed Business Group Opportunity, a separate Opportunity is required for each Business Group. Using this function, these separate Opportunities may be linked to each other.

- 1 Select the **New Sales Process Linkage** button
- 2 Select the ID Type from the list – for example, Mixed BG Opportunity
- 3 Add the relevant ID – for example, the Opportunity ID of the associated Opportunity for a mixed Business Group deal

Sales Process Linkage 1 **New Sales Process Linkage**

No records to display

Sales Process Linkage Edit

New Sales Process Linkage

Sales Process Linkage Edit Add Row Save Cancel

Information

Opportunity	ID Type	ID
Server Refresh 2	--None--	
Server Refresh 2	--None--	
Server Refresh 2	--None--	
Server Refresh 2	--None--	
Server Refresh 2	--None--	

--None--

Customer PO

Deal Registration #

Eclipse

Eclipse - VBD

Eclipse - VEP

Encore Quote

Global Opportunity ID

GSB Serial Number

ICC Quote

Invoice Number

IRIS config ID

Mixed BG Opportunity

No Discount

OnlinePriceBook ID

Order Number

PreSalesSupport - RMX

PRO MFG Customer Number

Quicksilver DealONE Id

Quote Number

Reseller PO

Smartquote ID

WBS Code

Add a Competitor

- 1 Select the **New** button in the Competitors section
- 2 Use the **Search Icon** to begin your search
- 3 Enter the competitor name and click to **Go** button
- 4 Click the **Competitor Name** hyperlink to select
- 5 Mark as **Primary or Incumbent** and save

Competitors 1 **New**

No records to display

Competitors

Add Competitors

Competitor Account	Primary	Incumbent
<input type="text"/>	<input type="radio"/>	<input type="radio"/>
<input type="text"/>	<input type="radio"/>	<input type="radio"/>
<input type="text"/>	<input type="radio"/>	<input type="radio"/>
<input type="text"/>	<input type="radio"/>	<input type="radio"/>

Save Cancel

Competitor Account Search 3

Name Dell BG --None-- Go

Competitors filtered by Opportunity Account Region

You can use "*" as a wildcard next to other characters to improve

Competitor Account Name	BG
Dell Financial Services L.L.C.	HPFS
Dell Inc. 4	PSG;IPG;E
Dell Software, Inc.	ESSN;SW

Competitors

Add Competitors

Competitor Account	Primary	Incumbent
Dell Inc. 5	<input checked="" type="radio"/>	<input type="radio"/>
<input type="text"/>	<input type="radio"/>	<input type="radio"/>
<input type="text"/>	<input type="radio"/>	<input type="radio"/>
<input type="text"/>	<input type="radio"/>	<input type="radio"/>

Save Cancel

Add Notes and Attachments

Add relevant notes and attachments to the Opportunity by selecting the New Note or Attach File buttons in the Notes & Attachments section

Notes & Attachments

No records to display

New Note **Attach File**

Note Information

Private

Title

Body

Save Check Spelling Cancel



Create and Manage Opportunity

Opportunities

General:

- ✓ Creating an Opportunity is the first step in the Integrated Quoting process – from the Opportunity, you can then Register a Deal (if applicable) and create a Quote.
- ✓ To edit an existing Opportunity from the Opportunities page, click the Opportunity Name. The Edit button will enable you to update the Opportunity Header only.
- ✓ Cross Business Group deals (Enterprise Group/EG and Printing and Personal Systems Group/PPS) require a separate Opportunity for each Business Group.
- ✓ All fields with a red bar on the left hand side are mandatory fields and must contain data.
- ✓ You may also add a Quote or Deal Registration to an Opportunity that was created by HP and assigned to you. These Opportunities can be found on the Home page of Salesforce.com.

Customer Search:

- ✓ When searching for end customer, use primary search (using the **Search** button) to find the customer when possible. If the customer cannot be found, using the **Expanded Search** to bring up the customer locations. The **Create New Customer** button should only be used if all other searches have been unsuccessful.

Opportunity Header Level Information:

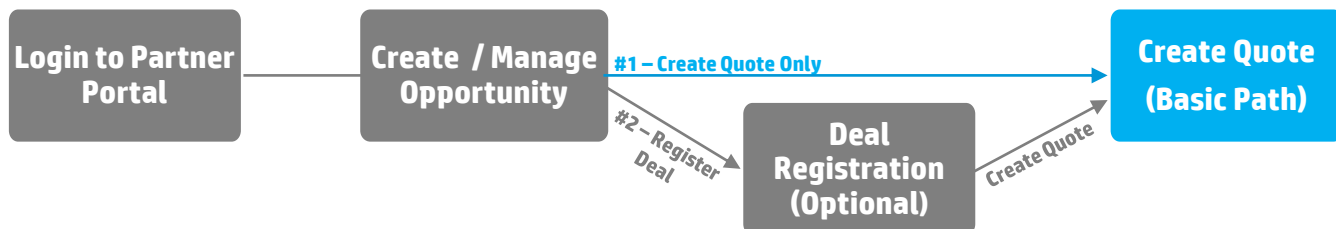
- ✓ The Opportunity Name may not contain any of the following characters: \ / : * ? " < > |
- ✓ The Close Date of the Opportunity should correspond to the expected start of delivery of products, and should be maintained to reflect any changes.
- ✓ The Sales Stage should be left on stage 01 – the Sales Stage will be automatically updated as you move through the process. The only time you need to change the Sales Stage is if the deal has been lost – in this case, change it to **Lost**.

Opportunity Details:

- ✓ A Distributor must be added to the Opportunity in order to create a Deal Registration or a Quote.



Create a Quote, Get Pricing, Accept Quote & Generate OPG



Quoting Overview:

- Quoting is the mechanism used to request special pricing for specific deals.
- Where eligible, you will receive an instant price, immediately when you submit your price request.

Topics Covered In This Section: [For more information refer also to the Guide to Adding Products and Configurations](#)

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Start the Quoting Process

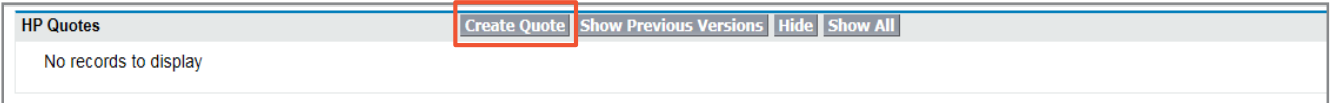


Start the Quoting Process by clicking the Create Quote button.

Note: "Mixed" Quotes (EG and PPS together) are not permitted. Please create separate Opportunities and Quotes for each Business Group.

Select the Create Quote Button

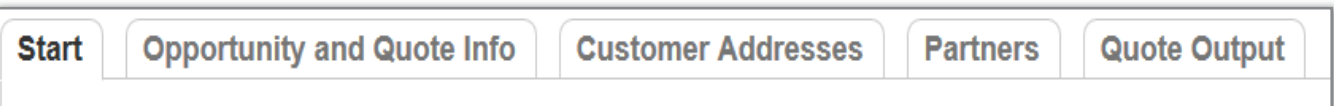
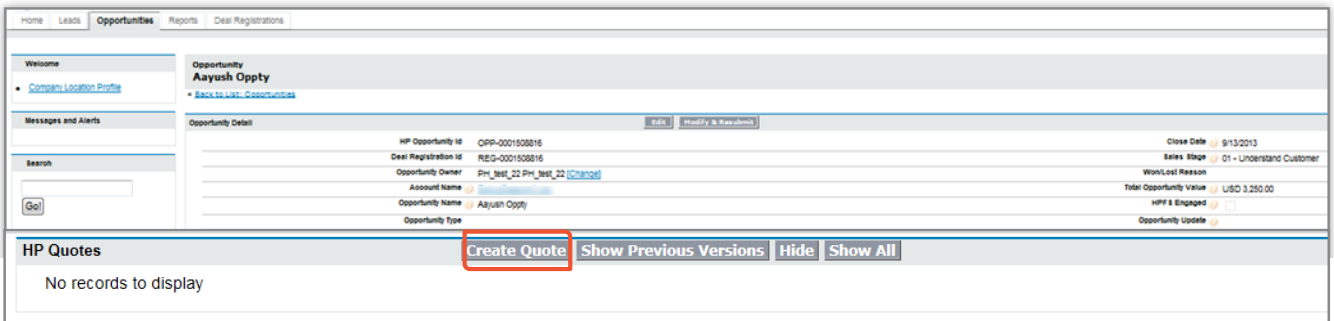
Click the **Create Quote** button in the HP Quotes section of the Opportunity. This will create a draft quote, where the details can be added and submitted for pricing.



Sections of a Quote

There are 5 sections in a quote:

- **Start:** Add special flagging and products
- **Opportunity and Quote Info:** Opportunity and Deal Registration IDs, Customer Information
- **Customer Address:** Add customer contact information, manage shipping address
- **Partners:** Add additional contact if needed
- **Quote Output:** Generate Quote documents, in a variety of formats





Login → Opportunity → Register Deal (Optional) → **Build Quote** → Get Price → Accept Price → Generate Quote → Accept Quote → OPG Created

Add Special Flagging (Optional - only add information if applicable to the Quote)

Special Flagging Section:

1 Leave all items in this section blank, unless:

- An item on the **Deal Type** list corresponds to your quote (if so, select the Deal Type) – note: deal type may vary by country

Deal Type	Usage
Demo	Request special pricing for products to be used in demo presentations (Customer Demos). EG only.
Government Deal/ Tender	Request special pricing for government or tender deals. EG Only.
Local Programs - Contractual	Request special pricing Printing products based on Partner contracts stipulating pre-agreed discounts. PPS Only.
Local Programs - Transactional	Request special pricing for typical Printing products transactions. PPS Only.
Program - EBDC	Request special pricing in accordance with Sales agreements. EG Only.
Program- Partner for Growth Channel	Request additional special pricing incentive offered by HP to encourage new business onboarding. EG and PPS.
Program- Sales Empowerment	Request special pricing based on pre-defined delegation from Sales. EG Only.
Program- TS Auto-Attach	Proactive attachment of care packs/accessories compatible with products selected by the partners on the Quote. EG and PPS.

- Your quote contains **only Supplies Products** (if so, see point number 2)
- The product is for **Internal Use** (if so, select the Internal Use box and the corresponding Deal Type)

Note: selecting a Deal Type will make the quote ineligible for an Instant Price

Price Descriptor Section:

The Price Descriptor should not be changed unless you have checked the **Quote contains Supplies Only** box

2 If your deal contains **Supplies Products Only**

- Check the **Quote contains Supplies Only** box
- Select a **Deal Type** (such as Channel MPS or Printing Big Deal Supplies)
- You will also be required to change the Price Descriptor on the right-hand side – the field that needs to be changed will be highlighted in red. For Supplies Only requests, the country of the Price Descriptor needs to be changed to “Europe”.



The Opportunity and Quote Info Tab



View Opportunity and Quote Information

The information on this screen has been provided in the Opportunity, and does not need to be re-entered. You may add a Sales Rep name if desired.

Start | **Opportunity and Quote Info** | Customer Addresses | Partners | Quote Output

MDCP Organization ID: 634206266
 Presales ID
 Go to Market Route: Indirect
 Lead Business Group

Quote & Opportunity Details

Title: Q1 Server Refresh | Opportunity Name: Q1 Server Refresh
 Quote Version: 01 | HP Opportunity ID: OPP-0003648146
 Completion Date
 Cancel Reason:
 Cancel Comments:

Cancel Quote

Customer Details

Customer Name: HP CONSULTING | Vat Number
 BU Customer Segment | Duns Number
 Global/Direct Account

HP Sales Support

Customer Sales Rep: | Partner Sales Rep

Deal Details

Deal ID | Deal Expiration Date
 Deal Name | Deal Registration Status

Created on: 12/15/20 11:46 AM by BMI RES DEMO EN 1(res_demo_en_1_bmi@mailinator.com)

Cancel a Quote

Draft, abandoned, or test quotes that you will not use again may be cancelled. This is applicable only to quotes that are not yet in Orderable status. Once the quote is cancelled, it cannot be resumed but it may be cloned if required.

- To cancel a Quote, go to the Opportunity and Quote Info tab, enter a **Cancel Reason**, and click the **Cancel Quote** button. Comments may be added if desired.
- To view cancelled Quotes, use the **Show All** button on the Opportunity screen

Quote & Opportunity Details

Title: | Opportunity Name: | HP Opportunity ID: OPP-0002876840

Quote Version: 01

Completion Date

Cancel Reason: **HP Cancelled** 1

Cancel Comments:

Cancel Quote

HP Quotes | Create Quote | Show Previous Versions | Hide | **Show All** 2

Action	Quote Name	Quote Number	Quote Version	Quote Status	Total	Quote Start Date	Quote End Date	Synced to Opportunity	Last Modified Date
<input type="checkbox"/>	Benson test US 6353 PH	T000201447-01	01	Cancelled	PHP 0.00	11/7/2014	12/7/2014		11/7/2014 6:11 PM
<input type="checkbox"/>	Benson test US 6353 PH	T000201460-01	01	Products Pending	PHP 0.00	11/7/2014	12/7/2014		11/7/2014 6:11 PM



Add End Customer Details and Manage Ship To Address

Add End Customer details in space provided

Start | Opportunity and Quote Info | **Customer Addresses** | Partners | Quote Output

Customer Contact Information

Customer Contact First Name

Customer Contact Last Name

Customer Telephone Number

Customer Email Address

[Add End Customer Contact Information](#)

Sold To Address

Address Line 1 City

Address Line 2 State/Province

Address Line 3 Postal Code

*Country

Ship To Address

Same as Sold to Address

Address Line 1 City

Address Line 2 State/Province

Address Line 3 Postal Code

Country

[Change the Ship To address if needed](#)



[Login](#)
[Opportunity](#)
[Register Deal \(Optional\)](#)
[Build Quote](#)
[Get Price](#)
[Accept Price](#)
[Generate Quote](#)
[Accept Quote](#)
[OPG Created](#)

View Partner Information

The information on this screen has been provided in the Opportunity, and does not need to be re-entered. You may add additional email addresses if desired.

Start	Opportunity and Quote Info	Customer Addresses	Partners	Quote Output
-------	----------------------------	--------------------	-----------------	--------------

Reseller Details

Reseller Name	AT System Validation Account RES	Reseller ID	1-KVUDRF
Address	at reseller address1_at city1,Austria,123456	Location ID	248527953
		VAT Number	
		P1 Membership Level	

Primary Contact		Additional Contact	Add additional contact if needed
First	<input type="text" value="Validation"/>	First	<input type="text"/>
Last	<input type="text" value="AT_RES_A_01"/>	Last	<input type="text"/>
Email	<input type="text" value="validation_at_res_a_01@transformq2c.com"/>	Email	<input type="text"/>
Phone	<input type="text"/>	Phone	<input type="text"/>

Additional Reseller Emails

[Add additional recipients for Reseller communications if needed](#)

Distributor Details

Distributor Name	AT System Validation Account DIS	Distributor ID	1-KVUDTX
Address	Address 123,Test,Austria,123456	Location ID	248527951
		VAT Number	

Single Distributor Selection

If more than one Distributor was added on the Opportunity, one can be marked as primary, by selecting the corresponding radio button.

Start	Opportunity and Quote Info	Customer Addresses	Partners	Quote Output
-------	----------------------------	--------------------	-----------------	--------------

Reseller Details

Reseller Name	ES System Validation Account RES	Reseller ID	1-KVUSNJ
Address	El Prat de Llobregat,Barcelona,Spain,08820	Location ID	40813117
		VAT Number	
		P1 Membership	

Distributor Details

Distributor Name	ES System Validation Account DIS 1	Distributor ID	1-L59NS4
Address	ES DIS Address1 ES DIS1 Add2 ES DIS1 Add3,ES DIS (1,ALAVA,Spain,123456	Location ID	40815649
Set Single Distributor	<input type="radio"/>	VAT Number	
Distributor Name	ES System Validation Account DIS	Distributor ID	1-KV/T0A1
Address	test,Spain,Spain,1234	Location ID	40813113
Set Single Distributor	<input type="radio"/>	VAT Number	



The Quote Output Tab



Generate Quote Documents

After you have accepted the price, you can generate the quote documents yourself

- 1 You can export the quote documents in PDF, DOC, XML, or Excel format
- 2 You can provide additional information to attach to the quote documents

Start

Opportunity and Quote Info

Customer Addresses

Partners

Quote Output

Display Options

Output Profile: Reseller View

Output Language: English

Include Cover Sheet:

File Options

PDF	Export	Email
DOCX	Export	Email
XML	Export	Email
Excel	Export	Email

1

Additional Information

Attach Additional Documents (PDF)

Attach Additional Documents (PDF)

Attach Additional Documents (PDF)

2

Cover Sheet

Summary Comment



Add Products



Products may be added from any of the quoting screens

Add Products (for details refer to the Products and Configurations Guide)

There are 5 ways to add products:

- 1 **Upload a configuration** – Important: use this button only for uploading configurations
- 2 **Upload a Product List** - use this button for uploading a stand-alone product list – not for configurations.
- 3 **Create a Configuration** from the self-service configurator
- 4 **Search products** from the database
- 5 Add a known product number using **Quick Key**

Product Configuration

"Import an existing configuration file produced by another HP tool (Sales Builder for Windows, TopConfig, IRIS or Piper). Valid file formats are .wwb, .sdd, .xml, .xls or .xlsx."

1 Upload Configuration

Import a list of HP product numbers and quantities. Valid file formats are .xls or .xlsx.

2 Upload Products

Product Configuration

Choose one of the following Products:

Please Select **3** Create Configuration

Help Me Choose Solution

Products

Use our Search to find and add your product(s)

4 Search Products

Click on the + icon to add a product directly to the grid

5 +

	Line #	Qty	Part Number	Description	Product Line
No Line Items Attached					

Once all quote information is added, request pricing



Get Price

Once all products and configurations have been added and other information checked / updated: Click the **Get Price** Button (found on all quote tabs). If the quote is eligible for an **Instant Price**, you will see the pricing instantly. This will be a market relevant / winning price. If you receive an Instant Price, the Product Grid will be updated with Line Item and Deal Level pricing:



Price Details

2 Line Item Level Pricing:

- **Model List Price:** undiscounted price, available with no special price request.
- **Reseller Net Discount %:** % Discount given through special pricing request (difference between List Price and Recommended Price)
- **Recommended Price:** the indicative price expected to be charged by the Distributor. The Distributor still decides the final price.

3 Deal Level Pricing (Quote Totals):

- **List Price:** Sum of List Price from all Line Items
- **Total Recommended Discount:** Sum of Discount from all Line Items
- **Total Recommended Price:** Sum of Recommended Price from all Line Items
- **Total Reseller Benefits:** Additional discount granted by an APPROVED Deal Registration. To add the Deal Registration benefits, click the Get Price or Accept Price button after the Deal Registration is approved. Do not click the Accept Quote button before the Deal Registration has been approved, as this will result in the benefits not being added to the quote.
- **Total Recommended Net Price with Benefits:** Total Recommended Price including Deal Registration benefits (Distributor makes the final price, this is an indicative price)

Part Number	Deal Number	Description	Product Line	Model List Price	Reseller Net Discount %	Recommended Price
643063-421		HP ProLiant DL580 G7 E7-4870 2.40GHz 10-core 4P 128GB-R P410i/1G FBWC 4x1200W HE PS Server	4Q	26,900.00	16.63	22,427.82

Quote Totals	
List Price	26,900.00
Total Recommended Discount	4,472.18
Total Recommended Price	22,427.82
Total Reseller Benefits	0.00
Total Recommended Net Price With Benefits	22,427.82

Notes:

- This price will be valid for **24 hours**. Once you accept the price, it will be valid for 30 days.
- Pricing on smaller deals may be without discount.
- Not all quotes will be eligible for an instant price (for example, if you have added a Deal Type, or flagged the quote as Supplies Only / Internal Use, or if other conditions are met). If an instant price is not available, please follow the escalation process on Page 27.



Get Price – Single Distributor Selection



Single Distributor Enforcement at Get Price

In some countries / under certain conditions, it may required to select a single Distributor if more than one Distributor was added in the opportunity.

- 1 If this functionality has been activated, a message will appear after clicking the Get Price button: "Only one Distributor can be added to this Quote. Please go to the Partner Tab, select one Distributor, and then click "Get Price" again."
- 2 To select a Single Distributor, navigate to the Partners tab, and select one of the Distributors by placing the radio button next to your choice.

Add Products

[Create Configuration](#)
[Upload Configuration](#)
[Search Products](#)
[Upload Products](#)
[Get Price](#)

1

"Only one Distributor can be added to this Quote. Please go to Partner Tab select one Distributor and then Click ""Get Price"" again."

[Close Quote](#)
[Save](#)
[Refresh](#)

[Request Assistance](#)
[Return to Opportunity](#)

HP Quote Number: T000183173-01

HP Quote Status: Products Pending

Title:

Customer:

[Start](#)
[Opportunity and Quote Info](#)
[Customer Address](#)
2
[Partners](#)
[Quote Output](#)

Reseller Details

Reseller Name ES System Validation Account RES	Reseller ID 1-KVUSNJ
Address El Prat de Llobregat, Barcelona, Spain, 08820	Location ID 40813117
	VAT Number
	P1 Membership

Distributor Details

Distributor Name ES System Validation Account DIS 1	Distributor ID 1-L59NS4
Address ES DIS Address1 ES DIS1 Add2 ES DIS1 Add3, ES DIS (1, ALAVA, Spain, 123456	Location ID 40815649
Set Single Distributor <input type="radio"/>	VAT Number
Distributor Name ES System Validation Account DIS	Distributor ID 1-KVTD0A1
Address test, Spain, Spain, 1234	Location ID 40813113
Set Single Distributor <input type="radio"/>	VAT Number

3

- If the Distributor eligibility check fails, an error message will appear: The Distributor selected for this quote is not eligible to sell all of the products included (product numbers). Please update the Distributor or the products, then click Get Price.
- If the eligibility check passes and the quote will be locked to that Distributor. To change the Distributor, click 'Back' and re-select Distributor in the Partner section.



Accept Price and Generate Quote



Accept Price

- 1 You can edit the quote by clicking the **Back** button.
- 2 Review the **Terms and Conditions** before accepting the price
- 3 To convert the price request into a Quote, click the **Accept Price** button – this will create a quote valid for 30 days. You may request an extension to the Quote Validity by contacting your Pricing Advisor.
- 4 HP will give you a market relevant / winning price when you click **Get Price**. In exceptional cases you may need an even lower price to win a particularly aggressive deal – for these exceptional cases, click the **Escalate Pricing** link.

Line #	Qty	Part Number	Deal Number	Description	Product Line	Model List Price	Reseller Net Discount %	Recommended Price	Reseller Program Benefits	Recommended Price with Benefits	Program Type
1.0	1	JD265A		HP U200-S 2-port Gig-T Module	1U	€639,00	0.0	€639,00	€63,90	€575,10	Customer

Generate Quote Documents

After you have accepted the price, you can generate the quote documents yourself

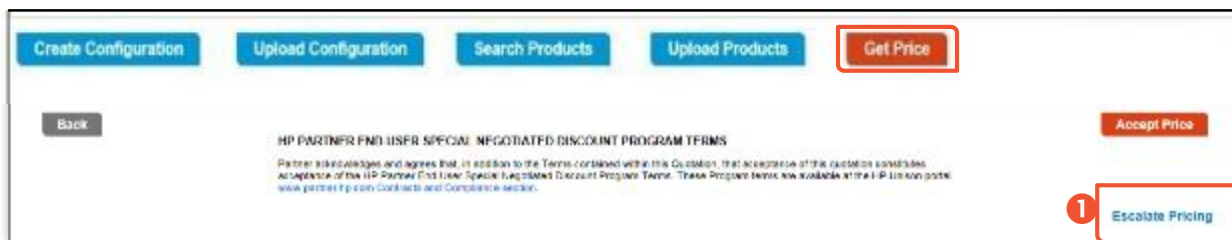
- 1 You can export the quote documents in PDF, DOC, XML, or Excel format
- 2 You can provide additional information to attach to the quote documents



Manage Price Escalation

- Pricing is carefully calculated to be market relevant and at a level to win the business. However, if you are working on an exceptionally aggressive deal and get an instant price which cannot be used to win the business, you may escalate for a better price. This will incur additional processing time, and should be used only when really needed, as there is no guarantee of a better price.
- A pricing request may also be automatically escalated if it is not eligible for instant pricing (for example, if you selected a Deal Type on the Start Page, or if the product is not eligible)

1 Select the **Escalate Pricing** button (if not automatically escalated).



2 Add the Justification Type and Competitor from the drop down lists, additional justification in the Pricing Justification field, Add supporting documents if desired

Add Requested Buy Price, at either Line Item Level, or at Deal Level:

3 **Line Item level:**

- Use the **drop down list**, and select one of the following:
- **%** - requested discount % for line item
 - **Amt** – requested discount amount for line item
 - **Net** – requested buy price for line item

Recommended Price	Reseller Req Type	Reseller Req Disc
30.00	%	0.0
	%	
	Amt	
	Net	

4 **Deal level:**

- use the **Auto Allocation** section, and select one of the following:
- **Target Requested Total Disc %** - requested discount % to be applied to all line items
 - **Target Requested Net Price:** requested buy price for entire quote

Be sure to click the Submit button in the center of the page to send the request to HP!

Note: Some quotes may not qualify for pricing escalation. If you get an error message indicating that your request is not eligible for a price escalation, please accept the instant price that has been given. If you have questions you may contact your HP Representative.



Revise, Extend, or Accept Quote



Revise or Extend Quote

- 1 To change a quote, click the **Revise Quote** button.
 - Pricing given for existing products will be retained.
 - Newly added products are eligible for instant pricing.
- 2 Request an extension, by clicking the **Request Extension** button. Note: This button is only available on quotes which have been escalated. For Instant Pricing quote please use the **Revise Quote** button.
- 3 When the deal has been won, click the **Accept Quote** button – this will systemically mark the deal as “Won” and trigger OPG Generation.

Revise Quote	<p>1</p> <p>HP PARTNER END-USER SPECIAL NEGOTIATED DISCOUNT PROGRAM TERMS Partner acknowledges and agrees that, in addition to the Terms contained within this Quotation acceptance of this quotation constitutes acceptance of the HP Partner End-User Special Negotiated Discount Program Terms. These Program terms are available at Contracts and Compliance section. (https://partner.hp.com/group/upp-na/contracts-compliance)</p> <p><small>*If you have any Pending Deal Registration Benefits that are not Approved, they may be lost if you Accept Quote prior to their Approval*</small></p>	3 Accept Quote
		2 Request Extension

Accept Quote

Accepting the Quote will mark the deal as “Won” and trigger generation of the OPG. After the customer has accepted the offer and the business has been won, click the **Accept Quote** button to mark the deal as “won” and generate the OPG.

Revise Quote	<p>HP PARTNER END-USER SPECIAL NEGOTIATED DISCOUNT PROGRAM TERMS Partner acknowledges and agrees that, in addition to the Terms contained within this Quotation acceptance of this quotation constitutes acceptance of the HP Partner End-User Special Negotiated Discount Program Terms. These Program terms are available at Contracts and Compliance section. (https://partner.hp.com/group/upp-na/contracts-compliance)</p> <p><small>*If you have any Pending Deal Registration Benefits that are not Approved, they may be lost if you Accept Quote prior to their Approval*</small></p>	Accept Quote
		Request Extension

- Notes:
- If the opportunity includes a Deal Registration, do not click the Accept Quote button before the Deal Registration has been approved, or the Deal Registration benefits will be lost.
 - Clicking the Get Price or Accept Quote button after the Deal Registration is approved will pull the Deal Registration benefits into the Quote.



Create and Manage OPG



OPG Created

After accepting the Quote, an OPG is generated. The quote status changes to **orderable** and is also available in the Special Pricing Viewer for Distributors.

- Quote status changes to Orderable
- Deal ID displays is available. If multiple deals are created within the quote, the Deal ID will say "multiple" and the user must go to the "Opportunity and Quote Info" tab or original opportunity to view the Deal ID numbers.
- The Quote is complete and locked.

Request Assistance | Return to Opportunity

HP Quote Number: A000150505-01 **1** HP Quote Status: Orderable **2** Deal ID: 91813096
 Title: XX WW nextgen r10.0 DemoPrep 8 Dec Customer: CEMEX LATAM HOLDINGS SA.

1 Build > **2** Price > **3** Review

Start | Opportunity and Quote Info | Customer Addresses | Partners

Deal Type		Country	Spain
Quote Contains Supplies Only	False	Currency	Euro
Quote For Internal Use	False	INCO Terms	Duty Paid

Quote is Complete **3**
 Your quote is now locked. Request a quote revision

Please use the Revision Request Form to request any changes to this quote.
 "Or, use the Clone action to create a new quote using the same products."


Revise OPG

Once the Quote is complete and locked, changes/extension requests may be made by using the **Request a Quote Revision** button.

Quote is Complete
 Your quote is now locked.

Please use the Revision Request Form to request any changes to this quote.
 "Or, use the Clone action to create a new quote using the same products."

1 Request a quote revision



- If you need to revise a quote once it in Orderable status (OPG created), Click the Request Quote Revision button.
- You will be prompted to fill in a form to describe the updates that are needed.



View OPG in Special Pricing Viewer



The Special Pricing Communications Tool is a vehicle through which Distributors can obtain important quote specific communications and information after a Quote has been created and accepted.

Access the Special Pricing Viewer (PComm) – Search for Deal

HP Unison Partner Portal

My Workspace | Products | Sales & Marketing | Programs | Training & Certification

My Account	Deals	Orders	Benefits & Rewards
Partner Status	Register Deals	Ordering & Delivery Info	Compensation
Contracts & Compliance	Manage Leads	Order and Activate Care Pack	Invoice & Payment Status
Manage Users	Request a Quote	Manage Claims	
My Subscription Preferences	Special Price Communication (1)	Sales Inventory Reporting	
Smart Portal	Create Proposals		

My Dashboard Customize your Dashboard

- Integrated Quoting Tool**: Easily create and manage your special pricing quotes. [Go](#)
- Special Price Communication**: The Special Price Communicator or pComm, provides a single communication platform for special local, regional and global prices. [Go](#)
- Smart Quote**: The tool enables you to submit requests for special pricing through the partner portal. [Go](#)

1 The Special Pricing Viewer is accessed via the Portal from the My Workspace > Deals > **Special Price Communication** link

Contact HP Special Price Communication

Call HP	Self-Help
<p>U.S. Please call this number in the U.S. anytime between 6am-5pm PT Monday-Friday. This number supports English questions related to the HP Special Price Communication web site.</p> <p>888-629-5914 (Option 4)</p>	<p>→ Frequently asked questions (FAQ)</p>
<p>Canada Please call this number in Canada anytime between 5am-5pm PT Monday-Friday. This number supports English and French questions related to the HP Special Price Communication web site.</p> <p>800-668-7670 (Choose language, then Option 3)</p>	
<p>EMEA: Please call the telephone number below for assistance in the specified language.</p> <p>German +49 69 51709904</p> <p>French +33 15 7323606</p> <p>Spanish +34 91 2754988</p> <p>Italian +39 02 91483471</p> <p>English +44 20 30276715 (UK & Ireland) +44 20 30276716 (International)</p>	

2 A dedicated Support Team for the Special Pricing Viewer can be reached by clicking the **Contact HP** Button when in the Special Pricing Viewer



View OPG in Special Pricing Viewer



Access the Special Pricing Viewer (PComm) – Search for Deal

After you have accepted the price, you can generate the quote documents yourself

- 1 Enter search criteria and click the **Submit** button
- 2 Click to **Modify Search Criteria** if necessary
- 3 Click Deal Number to view individual deal
- 4 Email or Export selected lines
- 5 Select Content and Format criteria, and click Submit

Search deals

Deal number

SmartQuote ID

Customer starts with contains

Partner starts with contains

Deal Type

Promotions All deals, including promotions
 Exclude promotions
 Include only promotions

Include expired deals?

Deals expiring within days

Modified between (mm/dd/yyyy) and

Deal/Sellout between (mm/dd/yyyy) and

1

HP Special Pricing Terms and Conditions apply and are contained within each specific deal.

Deal List
ALSO ACTEBIS GMBH (1-1G1-20)

> View PDF document list

About the list
1 deal is available that meets your **selection criteria** **2**

Export list of quotes ([xls](#) or [txt](#))

HP Confidential and Proprietary Information – Do Not Share

> select all this page
> deselect all this page

File send	Deal type	Multi-country?	Sort by Deal number	Expired?	Later version exists?	Sort by OPG	Sort by End customer	Sort by Deal description	Sort by Lead country	Discount type	Sort by Date modified	Sort by Deal/Sellout begin date	Sort by Deal/Sellout end date
4 <input type="checkbox"/>	Product promotion rebate		3 5023562 1.1	No	Won	HP	PROMOTION	GRS OCT 2	DE	Rebate	03/13/2013	03/13/2013	09/30/2013

> select all this page
> deselect all this page

4

Note: When e-mailing or exporting deals from this page, country-specific Terms and Conditions apply and can be viewed by clicking on individual deals.

File export preference

Content format Deal content Summary content

As-of date Current pricing All pricing

File format MS Excel (.xls) Plain text (.txt) XML (.xml -- deal content format only)

Zip file before e-mailing

E-mail address

5



View OPG in Special Pricing Viewer



- Login
- Opportunity
- Register Deal (Optional)
- Build Quote
- Get Price
- Accept Price
- Generate Quote
- Accept Quote
- OPG Created

Access the Special Pricing Viewer (PComm) – Manage Deal

Deal detail

Deal summary

Deal number: 91232400 v.1
 End customer: HP PROMOTION
 Deal description: HPN M3 Promo Q3
 Order date: Jul 7, 2014 to Jul 31, 2014
 Deal/Select date: Jul 7, 2014 to Jul 31, 2014
 Version validly date: Jul 7, 2014
 Last modified: Jul 7, 2014 1:26 PM GMT
 Deal type: Product Promotion Rebate
 Discount type: Rebate
 MC code: OSR
 Business group: Enterprise Group
 Business unit: HP Networking
 Lead country: DE
 Additional countries: AT
 Country price code: DE
 Currency price code: EC
 Price term code: DP
 HP Contact: ROXANA CARP
 Stock protection / days: Override
 Complex deal?: No

- » Download all partners (xls)
- » View partners

1

Acceptance of the quotation binds you to the [Discount Program Terms and Conditions](#). (opens a new window)

1. Select deal version

Version 1: first quoted Jul 7, 2014 (current)

2

2. Select pricing structure

Note: Where the price list used differs from the target country, the price list is listed in parentheses. For example, a translation to "Cambodia (ASEAN)" would use the ASEAN price list.

Germany - EC - DP

3

3. Select pricing period

As-of date
 Current pricing
 All pricing
 Jul 7, 2014 (mm d, yyyy)

4

Important: This deal is marked as won so the maximum quantities are not displayed.

Export ALL line items (x) or (y), or just the product translation (x) or (y)

» Group by product family

Product and price information

Product number	Product line	Description	Add. units	Dealer net price (EUR)	Remaining qty	Begin date	End date
J4659C	35	HP X721 1G SFP LC SX Transceiver		€ 59.00	9894	Jul 7, 2014	Jul 31, 2014
J4659C	35	HP X721 1G SFP LC LX Transceiver		€ 100.00	1429	Jul 7, 2014	Jul 31, 2014
J9225A	2H	HP 2520-24 Switch		€ 199.00	53	Jul 7, 2014	Jul 31, 2014
J9224A	2H	HP 2520-24-PFe+ Switch		€ 295.00	504	Jul 7, 2014	Jul 31, 2014
J9225A	2H	HP 2520-24-PuE+ Switch		€ 443.00	302	Jul 7, 2014	Jul 31, 2014

5

- 1 View or Download list of Partners
- 2 Change Deal Version if needed
- 3 Select new Currency if needed
- 4 Change Pricing Period if needed
- 5 View Remaining Quantity



Key Points: Quoting



Quote Creation, Get & Accept Price, OPG Management

General:

- ✓ The first step in creating quote is to create an opportunity.

Start Tab:

- ✓ **Deal Type** selection is optional – a Deal Type should only be selected if it is applicable to the Quote.
- ✓ If a Deal Type has been selected, the quote will not be eligible for an instant price.

Customer Address Tab:

- ✓ Always add **End Customer details** on the Customer Address tab

Adding Products / Configurations:

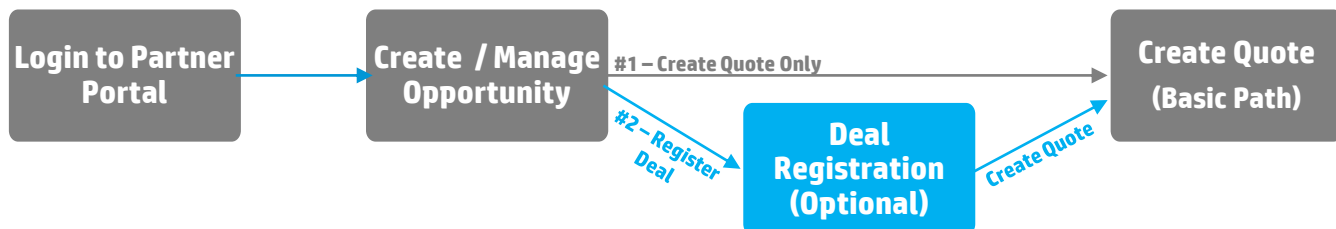
- ✓ Refer to the **Products and Configurations Guide** for more information on how to add products and configurations.

Pricing:

- ✓ If your request qualifies, you will be given an instant price when clicking the Get Price button.
- ✓ The price given in the quote is an indicative price – final pricing will be given by the Distributor.
- ✓ For smaller deals or non discountable products, you may be given pricing with no discount.
- ✓ When completing the Price Escalation Form, be sure to click the **Submit** button, to ensure the information is sent to HP.
- ✓ Some deals will not be eligible for price escalation – in this case, you will see a message informing you that no escalation is possible if you click the Escalate Price button.
- ✓ Your OPG may be viewed in the Special Pricing Viewer, which is accessible via the Portal.
- ✓ For pricing assistance, use the **Request Assistance** button on the quoting screens. Fill in the form completely, and be sure to submit to HP.



Section 3: Register a Deal



Deal Registration Overview:

- Deal Registration is for authorized partners and specific deal only.
- Use Deal Registration when applying for additional program benefits, for example, if your deal qualifies is a New Business Opportunity qualifying for Partner for Growth benefits.
- If the Deal Registration is approved by HP, additional discount will be applied to associated Quotes, if the Get Price or Accept Price button is used after the Deal Registration has been approved.

Topics Covered In This Section:

Topic	Page
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Add Products (Product Line Level)	37
Register for a Program	38
Manage a Deal	39
View Registration Details and Benefits (discount %)	39
Key Points: Deal Registration	40

Register a Deal (Optional)



Deal Registration is for specialist partners and for specific deals only. If your deal is eligible for Program Benefits, for example, Partner for Growth, you can register it through Integrated Quoting. It is not necessary to register a deal for every Quote.

Using the Deal Registration Tab

A new Opportunity may be created directly on the Deal Registrations tab of Salesforce.com.

New Opportunity for Deal Registration									
Deal Registration Id	Submission Date	Status	Customer Account	Opportunity	Program	Deal Registration Value	Expiration Date	Last Modified Date	

Deal Registration Steps

The steps needed to complete a Deal Registration can be seen by clicking the **Deal Registration Steps** button. Each of these steps contains a link, which will take you to the corresponding part of the process.

Opportunity Detail [Edit] [Engage HP Financial Services] [Clone Opportunity]

HP Opportunity Id: OPP-0002883257
 Deal Registration Id: REG-0002883257
 Opportunity Owner: Validation ES_RES T_01 [Change]
 Account Name: [Change]
 Opportunity Name: [Change]
 Opportunity Description: [Change]
 Managed By: Partner

Deal Registration Steps

Register your deal

1. Add Distribution/Reseller partner(s) (unless not required)
2. Manage products (add product lines)
3. Apply Programs (select & submit)

Manage your deal

4. Request extension (within 30 days of expiration date)
5. Manage (edit) products (save product changes!)

Add Products and Services

- 1 To add Product Lines for a Deal Registration, select the **Manage Products & Services** button in the Products (Products & Services) section
- 2 If you do not know the Product Line of a Partner Number, it can be found by using the **Part # Lookup**
- 3 Use the **Search Icon** to view and search for a Product Line – use Business Unit filters if needed (BG, GBU)
- 4 Click the **Product Name** hyperlink to select a Product Line
- 5 Add **Quantity and Unit Price**, then click the **Add** button

Products (Products & Services) [Sort] [Product FAC] **Manage Products & Services** 1

No records to display

Opportunity : JF BMI PROD 1 [Help]

Opportunity Id: OPP-0002658576 Total Opportunity Value: EUR.00 BG: --None-- GBU: --None--

Account Name: Gebro Holding GmbH Total FFYR: EUR.00 Product Line: [Search] Sub Product Line: [Search]

Sales Stage: 01 - Understand Customer Total First 12 Month Value: EUR.00 Quantity: 1 Unit Price: [Search]

Close Date: 13/06/2014 Book/Ship Date: 13/06/2014 [Add] [Clear] **Part # Lookup** 2

Product Name	BG	GBU	Product Line
1U - Networking Applications 4	EG	HP Networking	1U - Networking Applications
16 - Enterprise Switching	EG	HP Networking	16 - Enterprise Switching
17 - Routing	EG	HP Networking	17 - Routing

Opportunity : JF BMI PROD 1 [Help]

Opportunity Id: OPP-0002658576 Total Opportunity Value: EUR.00 BG: EG GBU: HP Networking

Account Name: Gebro Holding GmbH Total FFYR: EUR.00 Product Line: 1U - Networking Application Sub Product Line: 1U - Renew Telephony Prod

Sales Stage: 01 - Understand Customer Total First 12 Month Value: EUR.00 Quantity: 20 Unit Price: 500

Close Date: 13/06/2014 Book/Ship Date: 13/06/2014 5 [Add] [Clear] [Part # Lookup]

Register a Deal (Optional)



Apply Program(s)

- When all Product Lines have been added, select the **Apply Programs** button
- Select the desired program(s) (for example PfG, Preferential Pricing – programs may vary by country) and fill in the short questionnaire
- Select the checkbox for the applicable program(s) and click the **Save and Review** button
 - When ready, **Submit for Approval**

Close all messages

The following operations performed were SUCCESSFUL.
Insert Success: 1U - Networking Applications

Use action link to edit

Action	BG	GBU	Product Line	Sub Product Line
<input type="checkbox"/> Edit Del Sch	EG		HP Networking	1U - Networking Applic

Cancel **Save & Review**

Program Name

PFG HPN Iberia

Product Lines:
1U - Networking Applications

Questionnaire:
What has been the Partner Involvement on this opportunity?
--None--

End Customer contact Information (Name, Phone Number and Email)

Program Level Approval

Program Level Approval:

- If you select a Business Unit based Program (such as PfG ISS), all Product Lines included in that Business Unit will be covered in the Deal Registration.
- For example, if you register Product Line SI, you will also get Deal Registration benefit for Product line SY, because they are both covered under the same program.

Program : PFG ISS TEST

Benefit Type : Front End

Benefit Taken From :
Indicative Buy Price

Benefit % Comments :

Product Line	% Benefit	Status
SI - Server Storage And Infrastructure	8.00	Approved
4Q - x86 4P Products	8.00	Approved
SY - Systems Division	8.00	Approved
PD - x86 PODs	8.00	Approved
FN - Hydrogen	8.00	Approved
JN - Mission Critical and Technical Services	8.00	Approved
4U - Volume Software	8.00	Approved
MV - Blades Units and Enclosures	8.00	Approved
FE - Cloud and Virtual Systems	8.00	Approved
9Y - Moonshot Server Support	8.00	Approved
K3 - HP Technology Software Services	8.00	Approved
06 - Industry Standard Servers Support	8.00	Approved
UZ - Converged Infrastructure Solutions	8.00	Approved
TN - Scale-out Computing and HPC	8.00	Approved
FS - Converged Management/OneView	8.00	Approved
UW - Installation and Deployment Services	8.00	Approved
2M - Moonshot	8.00	Approved

Product Line Registered

Additional product lines which will receive Deal Registration benefit, because they are all part of the same program.



Deal Registrations may be managed directly from the opportunity

Manage Deal Registration

Deal Registrations		Manage	Summary of Benefits	
<input type="checkbox"/>	Action	Deal Registration Id	Program	Status
<input type="checkbox"/>		REG-0003298479	PFG ISS TEST	Submitted

To manage a Deal Registration, select it, and click the **Manage** button in the Deal Registrations section of the Opportunity

If any actions are possible, there will be a selection box in the section where the action may be taken

1 If the deal is approaching its expiration date, there will be a **selection box in the Request Extensions section**. To request an extension, select the check box, and click the **Submit Selections** button.

2 The Convert VEP to VBD section is not used in EMEA and may be disregarded

3 If the deal has been submitted for approval, but not yet approved, you may withdraw the approval request to make changes by selecting the check box in the **Recall Deal Registrations Pending Approval** section, and then clicking the **Submit Selections** button.

Manage Deal Registrations

Submit Selections Return to Opportunity All

Request Extensions

These programs are expiring within the next 30 days, please request extensions

Select All

Program	Expiration Date	Comments
PFG ISS Test	1 Nov 14	

Convert VEP to VBD

There are no actions to be performed on your deal registrations at this time

Recall Deal Registrations Pending Approval

Select All

Deal Registration Id	Status	Program
REG-0003298479	Submitted	PFG ISS TEST

Submit Selections Return to Opportunity

View Deal Registration Details and Benefit

To view the details of the Deal Registration, select the Deal Reg ID in the Deal Registrations section of the Opportunity, from the Deal Registrations Tab at the top of the screen, or from a Deal Registration Report

To see the Deal Registration Benefit (% discount you will receive), click the **% Benefit Details** link (only valid for Approved Deal Registrations)

Deal Registration Detail			
Deal Registration Id	REG-0003439010	Status	Approved
Opportunity	Server Refresh	Rejection Reason	
Program	PFG ISS TEST	Comments from HP to Submitter	
Partner Account	ES System Validation Account RES	Comments from Submitter to HP	
Locator ID	40813117	Level of Support	
Customer Account	HP CONSULTING	Deal Registration Value	EUR 1.00
Extension Status		VEP Tier	
Submission Date	04/11/2014 16:31		
Expiration Date	05/12/2014 16:31		
Compensation Level			

Custom Links	
% Benefit Details	

Product Registrations				
Action	Business Group	Global Business Unit	Value	Product Registration
	EG	HP Servers	EUR 1.00	Approved

Program : PFG ISS TEST		
Benefit Type : Front End		
Benefit Taken From : Indicative Buy Price		
Benefit % Comments :		
Product Line	% Benefit	Status
SI - Server Storage And Infrastructure	8.00	Approved
4U - x86 4P Products	8.00	Approved
SY - Systems Division	8.00	Approved
PD - x86 PODs	8.00	Approved
FN - Hydrogen	8.00	Approved
JN - Mission Critical and Technical Services	8.00	Approved
4U - Volume Software	8.00	Approved
MV - Blades Units and Enclosures	8.00	Approved
FE - Cloud and Virtual Systems	8.00	Approved
9Y - Moonshot Server Support	8.00	Approved
K3 - HP Technology Software Services	8.00	Approved
O6 - Industry Standard Servers Support	8.00	Approved
UZ - Converged Infrastructure Solutions	8.00	Approved
TN - Scale-out Computing and HPC	8.00	Approved
FS - Converged Management/OneView	8.00	Approved
UW - Installation and Deployment Services	8.00	Approved
2M - Moonshot	8.00	Approved



Key Points: Deal Registration



Creating and Managing Deal Registrations

General:

- ✓ Deal Registration is for authorized partners and specific deals only. It is used to register deals for Program Benefits, such as New Business Opportunities under the Partner for Growth Program.
- ✓ The Deal Registration Tab contains existing opportunities. You may also trigger new Opportunity Creation from this page.
- ✓ A Distributor must be added to the Opportunity before completing the Deal Registration steps. For EG Deals, only 1 Distributor may be added. For PPS deals there is no restriction.
- ✓ Deal Registration is initially reached using the **Manage Products & Services** button on the Opportunity screen.
- ✓ The Product FAQ button may be used to identify product lines before starting the Deal Registration process.

Create Deal Registration:

- ✓ The quickest and most efficient way to add product lines is the following:
 - In the Add Products/Services box:
 - a. Click on magnifying glass icon next to Product Line field
 - b. Filter by Business Group or Global Business Unit as needed
 - c. To search for a Product Line containing a specific name, in Products/Services search page: tick “Contains” and click the Search button. This will display all Product Lines for given Business Group that contains the text you have entered
 - d. To select a Product Line, click the Product Line hyperlink.

Manage Deal Registration:

- ✓ If your deal is about to expire, request an extension using the **Manage Deals** section on the Opportunity.



Section 2

Supporting Topics



Supporting Topics

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How to Get Support



How to Get Support

If you have reviewed the training material and still have questions on the Deal Registration or Quoting process, please contact your **HP Pricing Advisor**.

Austria/Switzerland:

pricing.alps@hp.com

Benelux:

pricing.benelux@hp.com

Germany:

pricing.de@hp.com

France:

pricing.france@hp.com

Iberia:

pricing.iberia@hp.com

Nordics:

pricing.nordics@hp.com

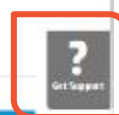
UK/Ireland:

pricing.uki@hp.com

For technical and “how to” questions, you may also contact HP Partner Support, by using the “Get Support” menu on the Portal

HP Unison Partner Portal

My Workspace Products Sales & Marketing Programs Training & Certification



Welcome to the new Partner Portal

A better sales experience starts here. The launch of the HP Unison Partner Portal is your invitation to a



PartnerOne status: Platinum

My notifications:

If you have a technical query when creating or managing a quote, you can get specialist assistance by using the **Request Assistance** button, found at the top of each quoting screen. This request will also lead you to your HP Pricing Advisor.



Or contact the HP Support Team here:

<https://h20375.www2.hp.com/portal/site/smartportal/ContactHPForm/>

Notes:

- If you have an issue with a configuration, please attach the configuration to the support request.
- Please add as a minimum a description of the issue

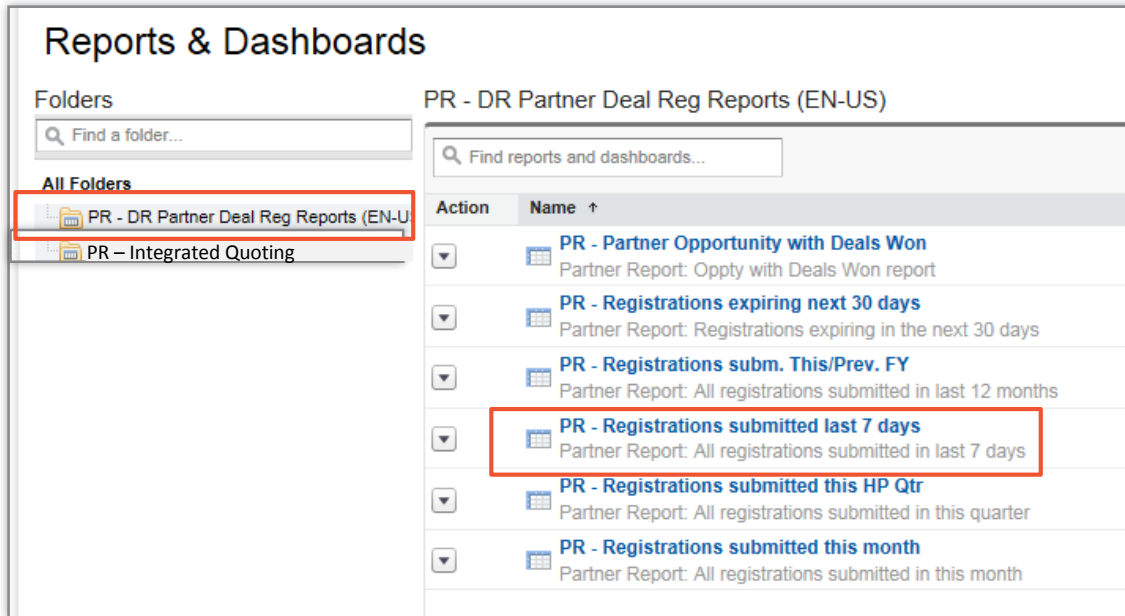
Navigate to Reports Tab

From the Salesforce.com homepage, click the Reports tab



Select and Run a Report

Select the folder corresponding to the type of report you wish to run, and select the report from the main window



Deal Registration Reports

- Partner Opportunity with Deals Won
- Registrations expiring in the next 30 days
- Registrations submitted in past 12 months
- Registrations submitted in past 7 days
- Registrations submitted this HP quarter
- Registrations submitted this month

Quote Reports

- Deals Expiring Next 7 days
- Opportunities & Quotes – Current Month
- Opportunities & Quotes – Current Quarter
- Opportunities & Quotes – Current Fiscal Year
- Opportunities & Quotes – Last 7 days
- Opportunities – WON Current Quarter

Export Report

Click the **Export Details** button to export the report to XLS format

Deal Registrations submitted last 7 days

Report Generation Status: Complete

ES System Validation Account RES Partner User

Report Options:

Filtered By:
Deal Registration Id starts with REG

Deal Registration Id	Account Name: Account Name	Opportunity Name	Deal Reg Status	Submission Date	Expiration Date old	Last Modified Date	Opportunity Sales Stage	Total Opportunity Value	Comments from HP to Submitter	Product Registration Name
REG-0003387939		XX_WW_NEXTGEN_R9.0_Vici_MEMA_Test_V4	Submitted	23/10/2014 12:39	21/01/2015 12:39	23/10/2014	Error	EUR 20,000.00	-	PR-92910

Select **Export File Encoding: Unicode**, **Export File Format: Excel Format .xls**, then click the **Export** button

Deal Registrations submitted last 7 days

Export Report

Export File Encoding: Unicode

Export File Format: Excel Format .xls

Open the document

Do you want to open or save report141449333756.xls from hp--community.force.com?

If you see this error message, click the **Yes** button

Microsoft Excel

The file format and extension of 'report141449333756.xls' don't match. The file could be corrupted or unsafe. Unless you trust its source, don't open it. Do you want to open it anyway?



Quote Status and Description

QUOTE STATUS	DESCRIPTION	PARTNER ACTIONS
1 Products Pending	<ul style="list-style-type: none"> Status shown on a new quote until products and/or configurations have been added and the Get Price button has been selected. 	<ul style="list-style-type: none"> Add products and/or configurations to the quote. When all products and configuration have been added, click the Get Price button.
2 Price Pending	<ul style="list-style-type: none"> Status shown when an instant price has been given, but not yet accepted or escalated. 	<ul style="list-style-type: none"> Accept the price, or In exceptional cases (if the instant price is not sufficient to win the deal), you may also use the Escalate Price button.
3 Processing Price Request	<ul style="list-style-type: none"> This status appears when the quote was systemically escalated, or escalated by using the Escalate Price button. This status will remain until HP has processed the price escalation, and the quote has been accepted. 	<ul style="list-style-type: none"> Complete the Price Escalation form and click the Submit button This will transmit the details to HP for processing When HP returns the pricing, accept the Quote – this will trigger the next status, Quote Review.
4 Quote Review	<ul style="list-style-type: none"> The pricing offered by HP has been accepted, and a quote has been generated. The quote is also on PComm for Distributors. 	<ul style="list-style-type: none"> Present the offer to the End Customer and try to win the business. When the deal has been won, use the Accept Quote button to mark the deal as “Won” and trigger OPG creation.
5 Processing Quote	<ul style="list-style-type: none"> Status displayed after clicking the Accept Quote button, in cases where the OPG cannot be generated immediately (due to system backlog or high risk EUV). HP will take action and notify you once completed. 	<ul style="list-style-type: none"> Wait for notification that the OPG has been created and the status has changed to Orderable.
6 Orderable	<ul style="list-style-type: none"> Status for Quotes which have been accepted, indicating that the deal is Won. 	<ul style="list-style-type: none"> Place your order with the Distributor.
7 Revised	<ul style="list-style-type: none"> Status shown while HP is processing OPG Revision (using Request a quote revision button). 	<ul style="list-style-type: none"> Wait for the results of the revision request. If your changes are accepted, the status will change to Orderable.
8 Quote Rejected	<ul style="list-style-type: none"> Status for OPG revisions which were not approved by HP. You will receive a parallel email with the corrective actions that you need to perform to obtain prices. 	<ul style="list-style-type: none"> Follow the steps indicated on the email.



Integrated Quoting Terms and Definitions

TERM	DESCRIPTION
Deal Registration	The activity of registering a deal for program benefits under one of HP's programs, such as Partner for Growth.
Non-discountable	Flag that denotes that the line item is not eligible for discounts.
OPG	Ordering Processing Guidelines. This document specifies that the quoted documents are orderable at the agreed price.
Price Escalation	The mechanism for asking for a better price when presented with an instant price. It is triggered by selecting the Escalate Price button. This mechanism uses the same form as the Pricing Auto Escalation.
Pricing Auto Escalation	If the system is unable to automatically apply instant pricing after the Get Price button is selected, the system will automatically open a form which needs to be completed in order to get the price.
Pricing Line Item Grid	Grid displaying configurations/products, the pricing and special discounts for each item.
Quote Revision	Changing products, configurations or quote information. Quote revisions can be done both pre and post OPG stage.
Quote Status	Conveys which stage the quote is. Statuses include: Product Pending, Price Pending, Process Pricing Request, Quote Review and Orderable, Quote Rejected.
RBP	Requested Buy Price, used in Price Escalations, entered by the partner to indicate the price that is needed in order to win the deal.
Recommended Price	The indicative price quoted to Resellers. The final price is given by the Distributor.
Special Pricing Communication Tool	Quote communication tool for Partners. Also called PCOMM.



Integrated Quoting Error Messages

Error Message

Explanation / Next Actions

Encountered when adding a product:

- ⊗ Could not perform Action: Save
- ⊗ Validation errors exist on the following 1 attribute(s):
- ⊗ PLC Obsolete Parts
- △ The following parts on this quote are obsolete <xxx> on Line: <xxx>

This error indicates that the product added in your quote is not available anymore, is classified as an obsolete product and you have to remove it. Please work with your HP contact to identify a replacement for the obsolete product.

Encountered when uploading a Configuration or Product List:

Message appears on product grid when uploading a configuration file or product list: "Pricing is not available; contact HP"

This error means that you have inserted products with no pricing available and you need to contact your HP representative.

Encountered when uploading a configuration file:

(SCE) has encountered a problem ✕

What happened at 2014-06-26 19:28:57,742 (UTC+3)

exception

How this will affect you

When you click OK, SCE may continue to run but there may be potential error.

What you can do about it

Try alternative methods of performing the same action or you can contact SCE support.

More information:ngc2:2014-06-26 16:28:53,120 <<

```
java.io.IOException: Invalid header signature; read 0x656C7974733C0A0D, expected 0xE11AB1A1E011CFD0
org.apache.poi.poifs.storage.HeaderBlock.<init>(HeaderBlock.java:140)
org.apache.poi.poifs.storage.HeaderBlock.<init>(HeaderBlock.java:115)
org.apache.poi.poifs.filesystem.NPOIFSFileSystem.<init>(NPOIFSFileSystem.java:198)
org.apache.poi.poifs.filesystem.NPOIFSFileSystem.<init>(NPOIFSFileSystem.java:163)
org.apache.poi.poifs.filesystem.NPOIFSFileSystem.<init>(NPOIFSFileSystem.java:145)
org.apache.poi.ss.usermodel.WorkbookFactory.create(WorkbookFactory.java:87)
```

OK

Please make sure to use a true Excel format when uploading an Excel Configuration. If another format is saved as Excel (such HTML saved as XLSX), there will be issues with uploading the file.

- To check the file type, open the file in Excel. If it is not a true Excel file, you will get this error message: The file format and extension of <file name> don't match. The file could be corrupted or unsafe. Unless you trust its source, don't open it. Do you want to open it anyway?
- By using the Save As option in Excel, the real file type will be exposed in the "Save as Type" field.
- Please ensure the information is stored as Text instead of numbers for following columns: Reference ID, Quantity and TC Flag.



Integrated Quoting Error Messages

Error Message	Explanation / Next Actions
<p>Encountered when using the Get Price button:</p> <ul style="list-style-type: none"> ⊗ Could not perform action: Get Price ⊗ Validation errors exist on the following 2 attributes: ⊗ HP Status ⊗ Distributor Partner Type △ Your request is currently being processed. Please note that if your deal was already available in PCOMM it may not be updated with the latest info until processing is complete. Please check back in 2 hours. △ Please return to the opportunity page and add Distributor 	<p>Error encountered in Partner Information: There is no Distributor listed on the opportunity. In order to proceed you must return to the Opportunity page and add a Distributor, then go back to the Quote and click Get Price again.</p>
<p>Encountered when using the Get Price button:</p> <ul style="list-style-type: none"> ⊗ Could not perform Action: Get Price ⊗ Validation errors exist on the following 1 attribute(s): ⊗ HP Status △ Your request is currently being processed. Please not that if your deal was already available in PCOMM it may not be updated with the latest info until processing is complete. Please check back in 2 hours. 	<p>This error specifies that there is a system error and you have to revert and check in 2 hours.</p>
<p>Encountered when a New Customer setup has been requested, and when processing the Quote, using the Get Price, Escalate Price, or Accept price buttons:</p> <ul style="list-style-type: none"> ⊗ Could not perform Action: Accept Price ⊗ Validation errors exist on the following 1 attribute(s): ⊗ MDCP Organization ID △ Please note that we will need some time to verify / create the end customer details. You will be notified once the process is complete. Pricing cannot be accepted until the end customer is verified. 	<p>Unverified Accounts (new customer added in a new quote) –this error appears when processing price request (statuses such as Get Price, Escalate Pricing and Accept Price) has the following meaning: We will need some time to verify/ create the end customer details. You will be notified once the process is complete. Pricing cannot be accepted until the end customer is verified.</p>



Integrated Quoting Error Messages

Error Message	Explanation / Next Actions
<p>Encountered on the Price Escalation screen:</p> <ul style="list-style-type: none"> ⊗ Could not perform Action: Submit ⊗ Please enter Competitor Information ⊗ Please enter Pricing Justification and Summary ⊗ Please enter Reqt Type and Reqt Disc for at least one part number to proceed with Submit action. 	<p>Before you click on the Submit button, please make sure you have completed all required fields such as: Competitor, Pricing Justification Summary, not only the Justification Type field.</p> <ul style="list-style-type: none"> • Competitor Information (*mandatory field) → We need more information to proceed with your request. Please complete the Competitor field so that we can process your request. • Pricing Justification & Summary (*mandatory field) → We need more information to proceed with your request. Please complete the Pricing Justification and Summary field so that we can process your request. • Req Type and Req Discount (RBP mandatory field) → We need more information to proceed with your request. Please complete the RBP field so that we can process your request
<p>Encountered on the Price Escalation screen:</p> <ul style="list-style-type: none"> ⊗ Could not perform Action: Submit ⊗ Please enter Competitor Information ⊗ Please enter Reqt Type and Reqt Disc for at least one part number to proceed with Submit action 	<p>Before you click on the Submit button, please make sure you have completed all required fields such as: Competitor, Pricing Justification Summary, not only the Justification Type field.</p> <ul style="list-style-type: none"> • Competitor –Escalation (*mandatory field) → We need more information to proceed with your request. Please complete the Competitor field so that we can process your request. • Req Type and Req Discount (RBP mandatory field) → We need more information to proceed with your request. Please complete the RBP field so that we can process your request.
<p>Encountered when using the Accept Quote button:</p> <ul style="list-style-type: none"> ⊗ Could not perform Action: Accept quote ⊗ Validation errors exist on the following 1 attribute(s): ⊗ Accept quote Validate Eclipse Deal Before New Deal △ The system is experiencing a high transaction volume at this time and cannot process your request. Please try again in a few minutes. 	<p>The system is experiencing a high transaction volume and your request cannot be processed. This indicates that you have to wait a few minutes to have the systems refreshed</p>



Thank You!