iQuote – Distributor Guide for SMB 2.0

Distributor guidelines for implementing SMB 2.0 using iQuote

9-Sep-2020

Version 1.5

Revision History

Version	Date	Revisions	By
1.0	27-Feb-2020	Initial draft	M Toms
1.1	27-Feb-2020	2nd Draft – minor readability changes	R Oliver
1.2	01-Jun-2020	Added HTML for post add to cart example	M Toms
1.3	08-Jul-2020	Added details of Sell-out endpoint, sell-out file upload and quote re-evaluation	S Chowdhury
1.4	08-Jul-2020	Final amendments following HPE Review	M Toms
1.5	09-Sep-2020	Add a short introduction of the settings and the technical changes – section 4, updated the Quote Status Update API with new endpoints – section 7.2, updated the Quote re-evaluation API section with new endpoints – section 7.3	D Stanilova

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1. Purpose Of Document

This document has been created to help Distributors understand the requirements for implementing the HPE SMB 2.0 promotional Program. It aims to provide a summary of how the Program will work and what is needed to support the Program from each Distributor.

2. Overview

SMB 2.0 is a new offer incentive from HPE designed to offer flexible discounts based on attach / system combinations rather than fixed bundles. The Program is like the older "Flex Attach" Program offered by HPE but extended beyond simple option attach. This removes many of the limitations of fixed bundling and allows customers to achieve discounts in numerous ways for differing configurations.

3. SMB 2.0 Program Features

The basic features of the Program are:

- HPE define the rules to "unlock" savings per system unit in iQuote via a management console
    - Rules can be one of 3 basic types:
        - **Attach**. The user is required to attach X qualifying options (optionally of a specific type) to unlock discounts
        - **Multi System**. The user is required to have X other systems (optionally of specific families) in the iQuote basket to unlock discounts
        - **Combo**. The user is required to attach X qualifying options (optionally of a specific type) AND / OR have X other systems (optionally of specific families) in the iQuote basket to unlock discounts
    - Rules can have maximum limits applied (e.g. only 1 Operating System, 2 qualifying servers per order etc.)
- SKUs (and quantities) qualifying for discounts can only be derived using iQuote so that the HPE defined unlock criteria (separate to the OPG) can be factored
- The list of qualifying SKUs (and associated fixed discount amounts) will be provided by HPE on an OPG and iQuote will load and store the qualifying options and systems
- iQuote will flag qualifying systems / options and allow filtering by the promotion
- iQuote will use the HPE defined rules to display to the user (once added to the iQuote basket) the unlock criteria, progress towards unlocking discounts and the discount once unlocked factoring this to a correct buy price in the basket total. Example iQuote basket concepts can be found in Appendix 3
- Claiming will be achieved by HPE receiving a data feed from iQuote showing the Quote ID, SKUs, quantities and OPGs and combining this with the sell-out data provided by Distributors

All unlock criteria and associated OPG flagging against quote items is handled by iQuote according to the HPE defined rules.

4. Planning of the SMB Offers 2.0 technical changes required on the web shop

Based on the settings used in HPE iQuote and how HPE iQuote is integrated with the web shop, there are changes required on the web shop to the way the standard and discounted prices will be provided to iQuote and to the SMB Offers parameters which will be passed from iQuote to the web shop as part of the iQuote order.

As part of the planning of this project, distributors will need to evaluate and plan the following technical changes to the iQuote integration with your web shop. Testing will be done in the iQuote UAT test environment.

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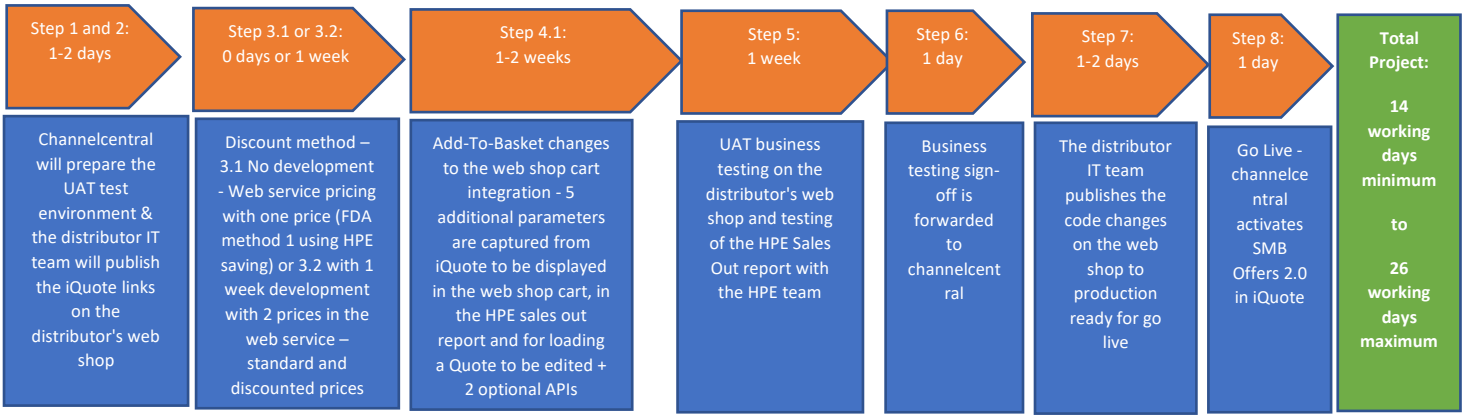
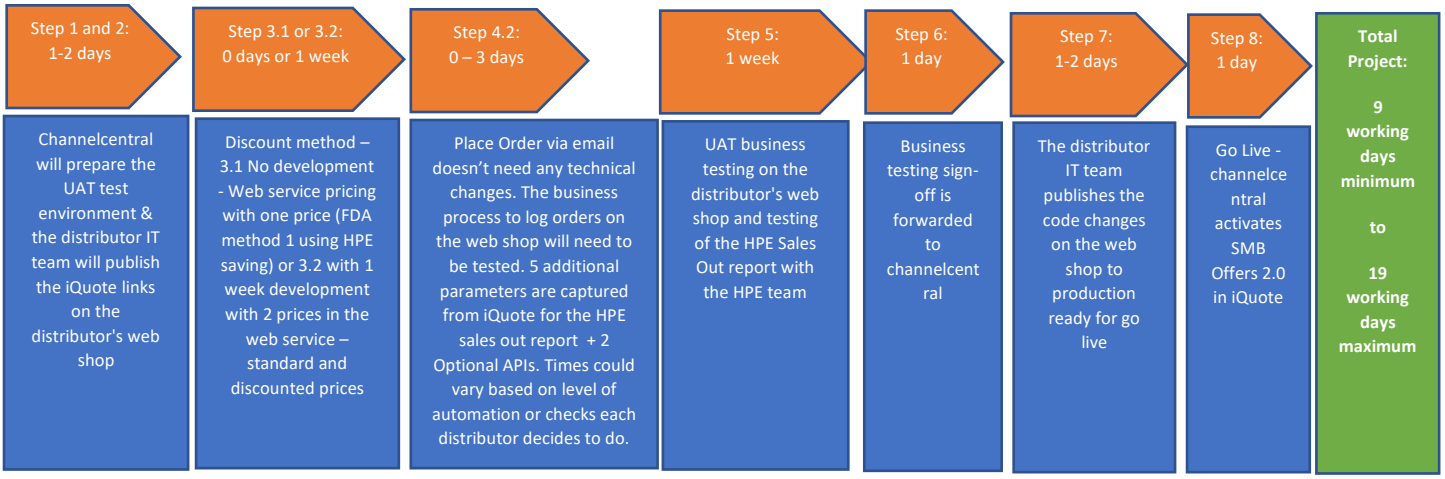
4.1 Steps for the distributor IT team and the channelcentral team to prepare the UAT test environment for testing

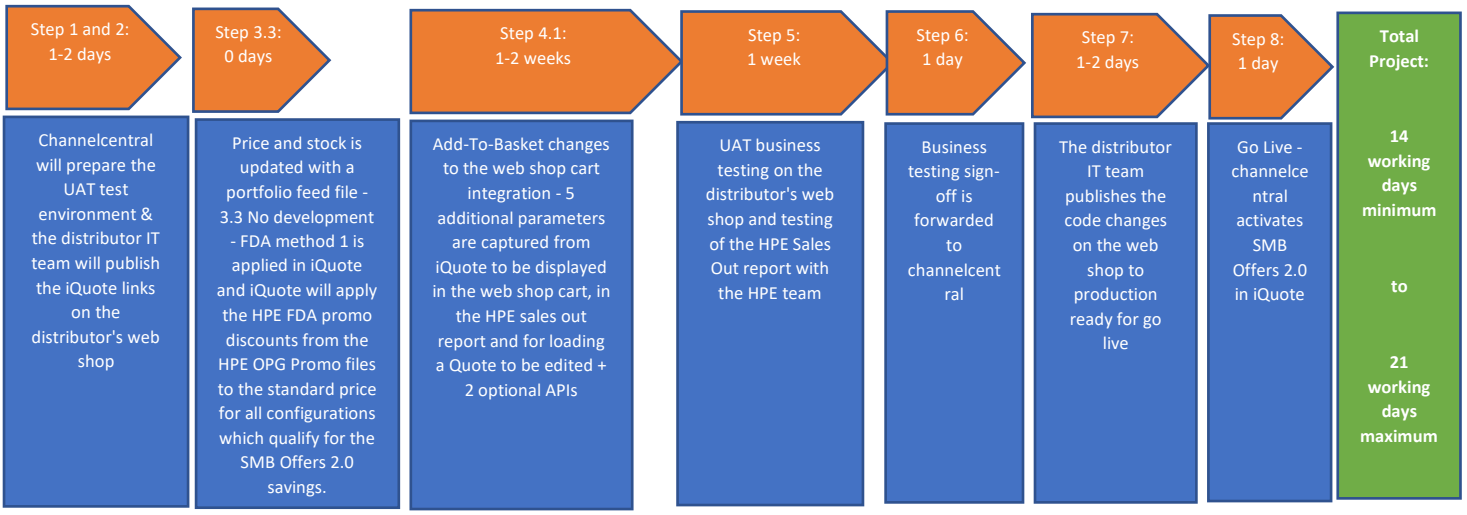
4.1.1 If iQuote is set up to use web service pricing and fully integrated Add-to-Basket with the web shop cart



4.1.2 If iQuote is set up to use web service pricing and place order via email



4.1.3 If iQuote is set up to use portfolio file pricing and Add-To-Basket fully integrated with the web shop cart



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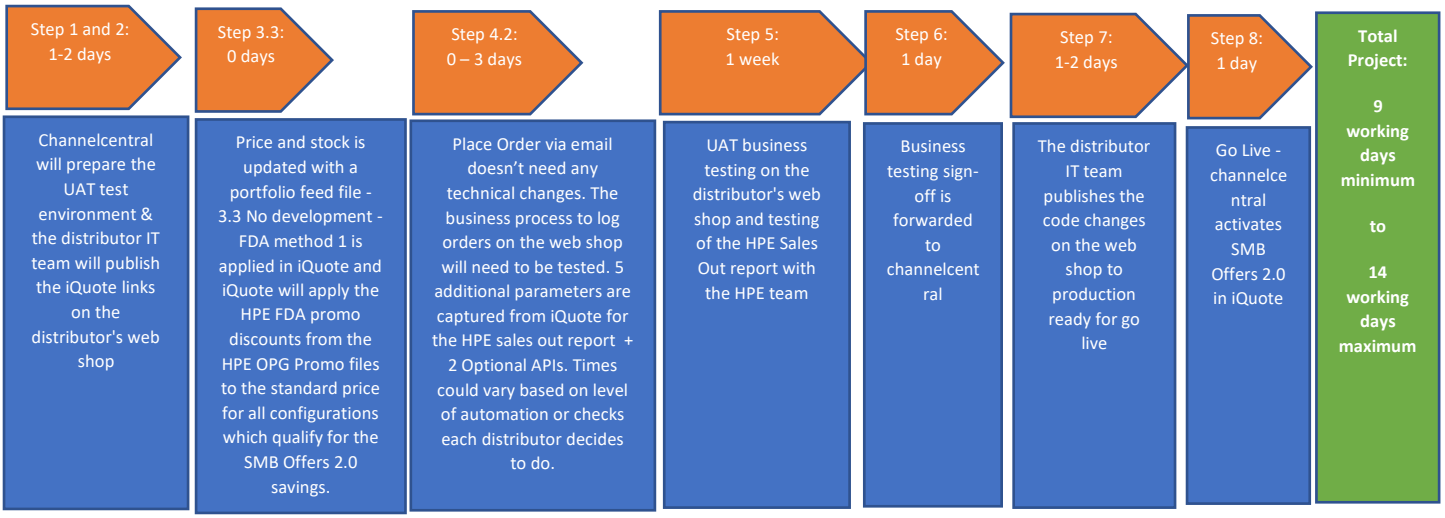
4.1.4 If iQuote is set up to use portfolio feed file pricing and place order via email



- **Step 1 (1 -2 days)** – Channelcentral will prepare the settings in the UAT test environment.
- **Step 2 (1 -2 days)** - The distributor's IT team will need to publish iQuote test links on the distributor's test web shop using the same single sign-on process which we currently use for iQuote on the production web shop. Only one URL will be changed to direct the login to the iQuote UAT Test environment
    - If the fixed token method is used for the single sign-on, the user details will be posted to this iQuote URL: **https://uat.hpiquote.net/aspx/gatekeeper.aspx**
    - If the one-time token method is used for the single sign-on, the user details will be posted to this iQuote URL: **https://uat.hpiquote.net/aspx/onetimetoken.aspx**. This will generate a one-time token which is passed with GET as a parameter to this URL: **https://uat.hpiquote.net/aspx/gatekeeper.aspx?token=xxxxxxxxxxxxxxx**
- **Step 3** – Based on the pricing method currently used in HPE iQuote, the distributor will need to select how the HPE FDA saving will be calculated in iQuote for SMB Offers configurations.
    - **Step 3 - Web Service price and stock update in iQuote** - If the price and stock in iQuote is updated in real time with a web service, the SMB Offers could be configured to use the HPE discount in iQuote or to use two prices from the distributor's internal system.
        - **Step 3.1 (0 days – no changes to the pricing update in iQuote)**
          Method 1 -> section '6.1.1. iQuote – Discount Value' - iQuote will apply the HPE FDA promo discounts to all configurations which qualify for the SMB Offers 2.0 savings. No changes are required to the pricing web service integrated in iQuote. The web service continues to provide one standard price per customer and iQuote will apply the HPE SMB Offers savings on top of that standard price for each customer.
        - **Step 3.2 (1 week)**
          Method 2 -> section '6.1.2 and 6.1.3 iQuote – Discount Value' – The business team could select to provide one standard price and one discounted price to iQuote for each customer and iQuote will calculate the saving. The distributor IT team will need to change the existing web service and will provide standard price and discounted price for each customer. iQuote will calculate the saving which will be displayed in iQuote for each customer as distributor standard price minus distributor discounted price.
    - **Step 3.3 (0 days) - Portfolio feed file pricing and stock update - (0 days – no changes to the pricing update in iQuote) - Method 1 -> section '6.1.1. iQuote – Discount Value'** - if the price and stock in iQuote is updated with a portfolio feed file, the distributor standard price and stock will continue be updated in iQuote with the existing portfolio file which is uploaded to the iQuote FTP server daily. iQuote will apply the HPE FDA promo discounts from the HPE OPG Promo files to all configurations which qualify for the SMB Offers 2.0 savings. No change is required to the portfolio file and how prices and stock are updated in iQuote.
- **Step 4** – Add-To-Basket technical changes on the distributor web shop to the iQuote integration with the distributor's web shop cart:

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- **Step 4.1 (1 – 2 weeks)** Fully integrated Add-To-Basket integration with XML basket being posted to the distributor web shop cart – currently, HPE iQuote posts an XML + customer account number (cAccountNum) + SessionID (active session from the distributor web shop) to a Basket URL on the distributor side and the iQuote order is displayed in the distributor web shop cart for the user to check out the order. For SMB Offers 2.0, there are several changes which will be required to the way the distributors will need to display the discounts to the end user in the web shop cart, to the Sales out report forwarded to the HPE system to claim the SMB Offers discounts from HPE and to the way quotes are edited in the web shop cart before the order is checked out on the distributor web shop.

  These are the required technical changes to the web shop cart on the distributor web shop:

  - **How the order is displayed to the end user in the web shop cart** - The web shop cart will need to display to the reseller the savings for each item when the order qualifies for the SMB Offers discount. The saving per item could be taken directly from the XML posted to the distributor web shop + the OPGQuantity per item which is how many parts will qualify for the saving for that product in the configuration. This could be taken directly from the XML per item using the 'RebateValue' passed from iQuote. The following 5 parameters will be passed in the XML to the distributor BasketURL to display the saving in your web shop cart and the final buy price to the reseller:
    (1) HPEQuoteID for the order – this is Quote ID for that promo quote. This will be provided to HPE as the Bundle_ID in the Sales Out report and also will be used to reload a quote for editing in iQuote.
    (2) OPGQuanity for each product - the quantity for each item which qualifies for saving. Please be advised that now, only Qty is used which is the number of products that the user wants to buy for each part number. OPGQuantity could be different compared to Qty. For example, the user might be buying 6 Hard drives but only 3 might get OPG discounts. Then Qty=6 but OPGQty=3.
    (3) OPGEndDate – the HPE OPG Order End Date for this promo which could be displayed in the web shop cart once the order is passed to the web shop.
    (4) OPGRef – the HPE OPG ID or Deal ID for the SMB Offers promo passed for each item in the order
    (5) RebateValue – this is the unit discount value for this product. Total discount per product will need to be calculated OPGQty * RebateValue. If we have 50 discount per HDD, then 3 HDD qualify for HPE discount, then OPGQuantity=3,RebateValue=50.00 and TotalRebate for the HDDs will be 150.00.
  - **HPE Sales Out report** and what data will need to be captured for the fulfilled orders and passed to HPE in the Sales Out report which you already sent to HPE
    (1) The HPEQuoteID posted to the distributor basketURL will need to be captured and provided to HPE as Bundle_ID in the Sales Out report which you currently send to HPE.
    (2) The OPGQty posted to the distributor basketURL will need to be captured for each product in the order and provided to HPE in the Sales Out report as 'Quantity' for each product. Please be advised that at the moment, only Qty is used which is the number of products that the user wants to buy for each part number. OPGQuantity could be different compared to Qty. For example, the user might be buying 6 Hard drives but only 3 might get OPG discounts. Then Qty=6 but OPGQty=3.
    (3) OPGRef is the HPE Deal ID which will need to be added to the sales out report for the OPGQuantity that qualifies for the discount.
    (4) Quantity Reporting: In the sales out report, Distributors are expected to report the correct quantity tagged with appropriate OPG ID. OPGQTY posted to the distributor basketURL will need to be captured and reported along with OPGRef. For example, the user might be buying 6 Hard drives but only 2 might get OPG discounts. Then Qty=6 but OPGQty=2. Then the in sales out report, there will be two lines reported – line 1: Quantity = 2 (OPGQTY) along with OPGRef and line 2: Quantity = 4 (QTY minus OPGQTY) along with a different OPG if applicable.
  - **Editing of the Quotes in the web shop cart before being checked out on the web shop** Once a quote has been transferred from iQuote to your web shop, no modification is allowed within your web shop. If a user wants to make a change, the user is redirected back to iQuote to edit the quote and calculate the SMB Offers saving again for the edited quote. The reseller will need to see only Check out button or Edit button to be able to change the iQuote quote once the quote is in the web shop cart:

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(1) Using the single sign-on process to load that quote again in iQuote to re-evaluate the SMB Offers discounts – please use the same single sign-on process used in iQuote and add 'QuoteID'=HPEQuoteID as one additional parameter. This is shown as an example in the attached document.

- **Step 4.2 (0 days) - Place Order via email** - No technical work is required, only testing. The distributor sales team receives the email with the HPE SMB Offers savings per product included in the attachment in the email. The distributor sales team will finalise the order with the customer and will log the order manually in the distributor internal system to be shipped to the customer. For fulfilled orders, the distributor sales team will need to add the HPEQuoteID provided in the place order email to the HPE Sales Out report as Bundle_ID. The HPE Sales Out report is sent to the HPE system to claim the promo savings from HPE. Since there could be some time before the order is logged in the distributor internal system, the distributor sales team will need to check if the HPE saving is still the same for that HPEQuoteID when the order is confirmed by the customer and logged in the distributor internal system for shipping. The order cannot be changed outside of iQuote because the HPE Savings might change if the order changes.
  - **HPE Sales Out report** and what data will need to be captured for the fulfilled orders and passed to HPE in the Sales Out report which is sent to HPE
    (1) The HPEQuoteID posted in the attachment to your place order mailbox will need to be captured and provided to HPE as Bundle_ID in the Sales Out report which you currently send to HPE.
    (2) The OPGQty posted to the distributor basketURL will need to be captured for each product in the order and provided to HPE in the Sales Out report as 'Quantity' for each product. Please be advised that at the moment, only Qty is used which is the number of products that the user wants to buy for each part number. OPGQuantity could be different compared to Qty. For example, the user might be buying 6 Hard drives but only 3 might get OPG discounts. Then Qty=6 but OPGQty=3.
    (3) OPGRef is the HPE Deal ID which will need to be added to the sales out report for the OPGQuantity that qualifies for the discount.
    (4) Quantity Reporting: In the sales out report: Distributors are expected to report the correct quantity tagged with appropriate OPG ID. OPGQTY posted to the distributor basketURL will need to be captured and reported along with OPGRef. For example, the user might be buying 6 Hard drives but only 2 might get OPG discounts. Then Qty=6 but OPGQty=2. Then the in sales out report, there will be two lines reported – line 1: Quantity = 2 (OPGQTY) along with OPGRef and line 2: Quantity = 4 (QTY minus OPGQTY) along with a different OPG if applicable.
  - **HPE iQuote web portal to re-evaluate the SMB Offers saving for that quote when the quote is logged in the distributor internal system to be shipped** – channelcentral is working on a web portal which could be used by the distributor sales team to re-evaluate quotes when they are logged to be shipped after a few days. There is second option which could be integrated on the distributor web shop and use one of the optional APIs mentioned in point '4.2.1 Optional changes to be evaluated by the distributor business and IT teams'
  - **Editing of the Quotes need to be done always in iQuote to make sure the order still qualifies for the HPE SMB Offers saving** – the reseller might qualify for a discount in iQuote but if the reseller is allowed to remove products from the order or change the quantities per product, then the changed quote might not qualify for the SMB Offers discount. The reseller will need to edit the quote in iQuote and resubmit the order to the Distributor place order email with the place order button.

- **Step 5 (1 week)** – UAT Business testing in the iQuote UAT test environment and testing of the Sales Out report with the HPE team
- **Step 6 (1 day)** – Business testing sign-off email is forwarded to channelcentral.net
- **Step 7 (1 -2 days)** – The distributor IT team will publish all code changes added to the Add-To-Basket and/or to the pricing web service to their production web shop ready for the SMB Offers 2.0 go live.
- **Step 8 (1 day)** – Go Live. Channelcentral.net activates SMB Offers 2.0 in production

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4.2 Optional changes to be evaluated by the distributor business and IT teams

There are 2 additional Optional APIs which channelcentral will be offering to help distributors with the update of the status of quotes in HPE iQuote. Distributors could decide to adopt these two APIs or not. It depends how orders are handled on the web shop:

- API **SMB2EvaluateQuote (1 week development on the distributor web shop)** – **section 7.3** - if you keep orders on your web shop which the user is allowed to check out after a few days, then the SMB Offers discounts could have changed for these orders when the user decides to check out the order. We will be offering a RESTFUL API web service which could be used to check the new discounts for that quote ID before the user is allowed to check out the order that has been kept on your web shop for a few days. This will not allow the user to edit the quote but simply will allow you to check the saving for this quote.
- API **SMB2QuoteStatus/Update (1 -2 days)** - **section 7.2** – this RESTFUL API could be used by distributors to update in iQuote the status for the quotes which have been checked out on the distributor web shop. iQuote does not currently know when a quote has been checked out on the web shop after iQuote passes the quote to the web shop cart. To solve this, a new optional API and / or file upload will be provided to mark a quote as "sold-out" or 'checked-out' within iQuote.

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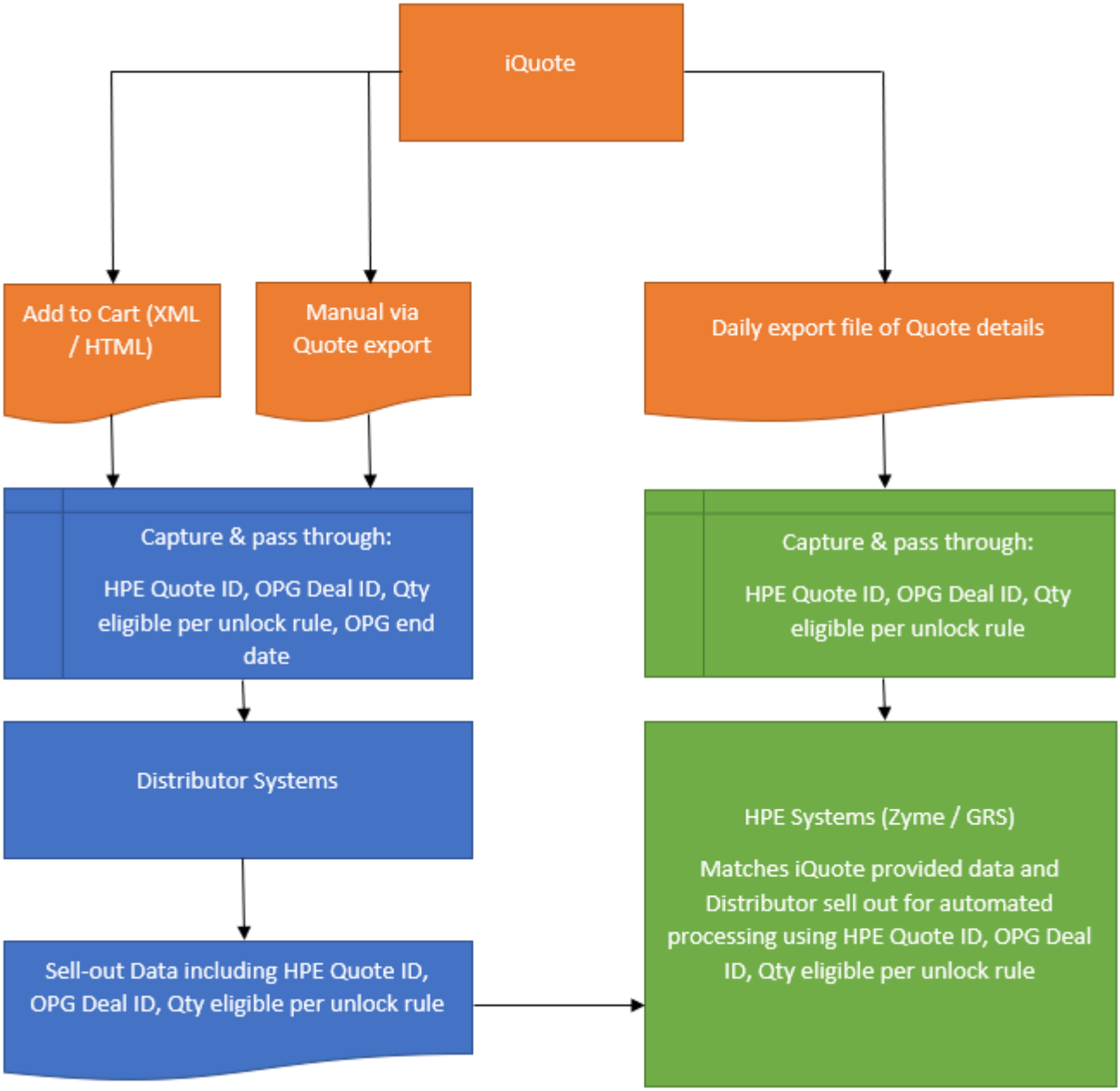
5. Claiming Process Flow

Automatic claiming is achieved using the following flow:



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Note: HPE iQuote ID is reported in the existing Bundle ID field in the sell-out data. It will be reported against all the line items that were quoted within iQuote irrespective of the fact that it had SMB 2.0 OPG or not.

6. Program Participation - Mandatory Elements

6.1 iQuote - Discount Value

Once a given system has reached an unlocked state (qualifies for discounts according to the HPE defined rules) each qualifying SKU (up to any maximums defined in the rule) will attract discounts. The discount value will then be deducted from the browse price to provide a final buy price for the user. The SMB 2.0 modifications for iQuote allow for 3 different methods to derive the discount offered:

1. **Honour the incremental FDA (Fixed Discount Amount) from the OPG provided by HPE**
    - Where this method is selected the Distributor does not need to undertake any modifications as the FDA provided by HPE in the OPG will be used
    - The browse price will be the Distributor provided price via the PnA
    - The discounted price will be the browse price less the FDA for that SKU from the OPG
    - Savings shown will be the FDA for that SKU from the OPG
2. **Allow a Distributor to provide 2 separate prices in their PnA (Price and Availability) web service**.
    - Where this method is selected the Distributor will need to undertake a modification to their PnA web service (where not already catered for) to provide 2 prices (standard price and discounted price). The iQuote integration to the Distributor PnA will be modified to read and store both prices
    - The browse price will be the Distributor provided standard price via the PnA
    - The discounted price will be the Distributor provided discounted price via the PnA
    - Savings shown will be browse price less discounted price
3. **Allow a Distributor to use 2 separate SKUs**.
    - Where this method is selected the Distributor will need to configure an alternate SKU to provide the discounted price.
    - iQuote will support a suffix or prefix of a given value to derive the SKU that will provide the discounted price
    - On calling the Distributor PnA web service for a SKU qualifying for discounts, iQuote will pass 2 SKUs, the standard HPE SKU and the suffix / prefix based HPE SKU
    - The browse price will be the Distributor provided standard price via the PnA for the standard HPE SKU
    - The discounted price will be the Distributor provided discounted price via the PnA for the suffix / prefix based HPE SKU
    - Savings shown will be browse price less discounted price

Each Distributor will need to nominate one of the choices above and notify the assigned channelcentral project manager of the choice. Where PnA integration work is required, this will need to be scheduled and aligned with the Distributor on a case by case basis

6.2 iQuote - Place order integration

In order to support the automatic claiming for rebates, the “Add to Distributor Cart” integration is changing to support additional data elements needed. The following data will be added to the place order XML / HTML generated by iQuote to transfer the quote to the Distributor cart:

- HPEQuoteID
    - The iQuote “Quote ID” will be added to the data so that it can be reported via the sell-out data to be combined at HPE with an associated export from iQuote to drive the automated claiming process
    - The format of this field will be:
        - Numeric 15 digits
        - First digit = 2
        - Subsequent 12 digits will be the iQuote “Quote ID” padded with leading zeros
        - Last 2 digits will be the Quote version padded with leading zeros
        - Example: Quote, 20123456 version 3 = 200002012345603

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- OPGref
    - Where a line item in the quote is eligible per unlock rule, this field will show the OPG Deal ID
- OPGQty
    - Where a line quantity is only partially eligible per unlock rule(e.g. due to maximums defined in the HPE unlock rule), this field will contain the number of the line quantity eligible per unlock rule (e.g. row has a quantity of 10 but only 6 are eligible per unlock rule due to maximums defined on the rule by HPE)
- OPGends
    - The date where the OPG specified in the data ends. This is to be used by Distributors to ensure the OPG is valid at the point of sale

On receiving a quote through the order integration, it is strongly suggested that the Distributor reprice the items in their cart. Care will be needed to pick the discounted price for OPG eligible SKUs / quantities and the browse price for non OPG eligible SKUs / quantities. The unit price rebate value is passed over (for SKUs / quantities valid for the OPG – "RebateValue") but it is suggested the Distributor re-prices to ensure correct prices in their basket

An updated version of the iQuote "iQuote IT Specifications - Data and Integration" can be found in Appendix 1 where the revised structure can be seen but an example XML can be seen below with the fields needed highlighted

```
<?xml version="1.0" encoding="UTF-8"?>
<Data>
  <Quote Supplier="JG Computo" CreatorEmail="test1@channelcentral.net" CreatedBy="QA Test Admin a" Name=""
ID="3552763" HPEQuoteID = "2000003552763 01">
    <Product>
      <SystemID>1</SystemID>
      <Class>System unit</Class>
      <PartNum>P06423-B21</PartNum>
      <SupplierPartNum>P06423-B21</SupplierPartNum>
      <Description>HPE Solution Server ProLiant DL380 Gen10 Intel Xeon-G 6130 16-Core (2.10GHz 22MB) 64GB (2 x 32GB)
DDR4 2666MHz RDIMM 8 x Hot Plug 2.5in Small Form Factor Smart Carrier Smart Array P408i-a No Optical 1 x UMB 2 x 800W
3yr Next Business Day Warranty</Description>
      <Qty>2</Qty>
      <Price>9323.0000</Price>
      <ListPrice>9323.0000</ListPrice>
      <OPGref>97083329</OPGref>
      <OPGends>25-Jun-2020</OPGEnds>
      <OPGQty>2</OPGQty>
      <RebateValue>2220</RebateValue>
      <URLProductImage>https://channelcentral.blob.core.windows.netimages/product/PROD_DL380GA.gif</URLProductImage>
      <URLProductSpecs>"http://h20195.www2.hpe.com/v2/GetDocument.aspx?docname=a00008180enw"</URLProductSpecs>
    </Product>
    <Product>
      <SystemID>1</SystemID>
      <Class>Memory</Class>
      <PartNum>815100-B21</PartNum>
      <SupplierPartNum>815100-B21</SupplierPartNum>
      <Description>HPE 32GB (1 x 32GB) Dual Rank x4 DDR4-2666 CAS-19-19-19 Registered Memory Kit</Description>
      <Qty>6</Qty>
      <Price>1259.7700</Price>
      <ListPrice>1259.7700</ListPrice>
      <OPGref>97083329</OPGref>
      <OPGends>25-Jun-2020</OPGEnds>
      <OPGQty>4</OPGQty>
      <RebateValue>492</RebateValue>
      <URLProductImage/>
      <URLProductSpecs/>
    </Product>
    <Product>
      <SystemID>1</SystemID>
      <Class>HW Support</Class>
      <PartNum>H8QP7E</PartNum>
      <SupplierPartNum>H8QP7E</SupplierPartNum>
      <Description>HPE 3 Year Foundation Care 24x7 DL380 Gen10 Service</Description>
      <Qty>2</Qty>
      <Price>1644.0000</Price>
      <ListPrice>1644.0000</ListPrice>
      <OPGref></OPGref>
      <OPGends></OPGEnds>
      <OPGQty>0</OPGQty>
      <RebateValue>0</RebateValue>
      <URLProductImage/>
      <URLProductSpecs/>
```


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```
    </Product>
  </Quote>
</Data>
```

Add to basket via HTML Post is also supported for legacy support reasons **although the XML transfer detailed above is preferred**. HTML post will be modified as followed (revised fields highlighted)

```
<!DOCTYPE html>

<html lang="en" xmlns="http://www.w3.org/1999/xhtml">
<head>
    <meta charset="utf-8" />
    <title></title>
</head>
<body>
    <form name="form1" method="post" action="https://yourwebsite.com/ResponseHandler.html"
id="form1">
        <div>
            <input type="hidden" name="__VIEWSTATE" id="__VIEWSTATE"
value="/wEPDwULLTIwNTI2NzgzNDVkZKnvoVUBj9tA7DuvEhleZ9tJ83xF" />
        </div>

        <div>
            <input type="hidden" name="__VIEWSTATEGENERATOR" id="__VIEWSTATEGENERATOR"
value="F60B6E15" />
        </div>
        <div>
            <input type="hidden" value="" name="configuration" />
            <input type="hidden" value="pquz3t55cr1rm5mb4m0kqh3p" name="LONGSID" />
            <input type="hidden" value="250295" name="cAccountNum" />
            <input type="hidden" value="configuration" name="CONTENT" />
            <input type="hidden" value="" name="Basket" />
            <input type="hidden" value="" name="BasketName" />
            <input type="hidden" value="" name="BearerToken" />
            <input type="hidden" value="" name="CompanyID" />
            <input type="hidden" value="" name="CountryCode" />
            <input type="hidden" value="" name="InstanceTag" />
            <input type="hidden" value="" name="Language" />
            <input type="hidden" value="" name="UserID" />
            <input type="hidden" value="" name="BasketURL" />
            <input type="hidden" value="iQuote" name="CallingApp" />
            <input type="hidden" name="SesID" id="SesID" value="pquz3t55cr1rm5mb4m0kqh3p" />
            <input type="hidden" name="UserID" id="UserID" value="test1@channelcentral.net" />
            <input type="hidden" name="Account" id="Account" value="250295" />
            <input type="hidden" name="cPriceBand" id="cPriceBand" value="" />
            <input type="hidden" name="QuoteID" id="QuoteID" value="3552763" />
            <input type="hidden" name="HPEQuoteID" id="QuoteID" value="200000355276301" />
            <input type="hidden" name="Grouped" id="Grouped" value="" />
            <input type="hidden" name="OrdType" id="OrdType" value="IQ" />
            <input type="hidden" name="Item[Prod1][PN]" id="Item[Prod1][PN]" value="P06423-B21" />
            <input type="hidden" name="Item[Prod1][SKU]" id="Item[Prod1][SKU]" value="4278416" />
            <input type="hidden" name="Item[Prod1][Qty]" id="Item[Prod1][Qty]" value="1" />
            <input type="hidden" name="Item[Prod1][Description]" id="Item[Prod1][Description]"
value="HPE Solution Server ProLiant DL380 Gen10 Intel Xeon-G 6130 16-Core (2.10GHz 22MB) 64GB (2 x
32GB) DDR4 2666MHz RDIMM 8 x Hot Plug 2.5in Small Form Factor Smart Carrier Smart Array P408i-a No
Optical 1 x UMB 2 x 800W 3yr Next Business Day Warranty" />
            <input type="hidden" name="Item[Prod1][Price]" id="Item[Prod1][Price]" value="9323.0000"
/>
            <input type="hidden" name="Item[Prod1][OPGRef]" id="Item[Prod1][OPGRef]"
value="97083329" />
            <input type="hidden" name="Item[Prod1][OPGEnds]" id="Item[Prod1][OPGEnds]" value="25-
Jun-2020" />
            <input type="hidden" name="Item[Prod1][OPGQty]" id="Item[Prod1][OPGQty]" value="1" />
            <input type="hidden" name="Item[Prod1][Rebate]" id="Item[Prod1][Rebate]"
value="2220.0000" />

            <input type="hidden" name="Item[Prod2][PN]" id="Item[Prod2][PN]" value="815100-B21" />
```


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```
            <input type="hidden" name="Item[Prod2][SKU]" id="Item[Prod2][SKU]" value="3986343" />
            <input type="hidden" name="Item[Prod2][Qty]" id="Item[Prod2][Qty]" value="6" />
            <input type="hidden" name="Item[Prod2][Description]" id="Item[Prod2][Description]"
value="HPE 32GB (1 x 32GB) Dual Rank x4 DDR4-2666 CAS-19-19-19 Registered Memory Kit" />
            <input type="hidden" name="Item[Prod2][Price]" id="Item[Prod2][Price]" value="1259.7700"
/>
            <input type="hidden" name="Item[Prod2][OPGRef]" id="Item[Prod2][OPGRef]"
value="97083329" />
            <input type="hidden" name="Item[Prod2][OPGEnds]" id="Item[Prod2][OPGEnds]" value="25-
Jun-2020" />
            <input type="hidden" name="Item[Prod2][OPGQty]" id="Item[Prod2][OPGQty]" value="4" />
            <input type="hidden" name="Item[Prod2][Rebate]" id="Item[Prod2][Rebate]"
value="492.0000" />
            <input type="hidden" name="Item[Prod3][PN]" id="Item[Prod3][PN]" value="H8QP7E" />
            <input type="hidden" name="Item[Prod3][SKU]" id="Item[Prod3][SKU]" value="3986392" />
            <input type="hidden" name="Item[Prod3][Qty]" id="Item[Prod3][Qty]" value="1" />
            <input type="hidden" name="Item[Prod3][Description]" id="Item[Prod3][Description]"
value="HPE 3 Year Foundation Care 24x7 DL380 Gen10 Service" />
            <input type="hidden" name="Item[Prod3][Price]" id="Item[Prod3][Price]" value="1644.0000"
/>
            <input type="hidden" name="Item[Prod3][OPGRef]" id="Item[Prod3][OPGRef]" value="" />
            <input type="hidden" name="Item[Prod3][OPGEnds]" id="Item[Prod3][OPGEnds]" value="" />
            <input type="hidden" name="Item[Prod3][OPGQty]" id="Item[Prod3][OPGQty]" value="0" />
            <input type="hidden" name="Item[Prod3][Rebate]" id="Item[Prod3][Rebate]" value="0.0000"
/>
            <input type="hidden" name="Multiplier" id="Multiplier" value="1" />
        </div>
    </form>
</body>
</html>
```

Distributors with basket integration enabled will need to modify their systems to receive and store this information for passthrough to sell-out

6.3 iQuote - Quote Export Changes

Additional information will be added to the iQuote “Quote Export” formats to support the additional fields defined in 3. above (where the Distributor does not support the “Add to Distributor Cart” integration **OR** a manual quote export is received from a customer).

An Example iQuote Quote Export can be found in Appendix 2

Under these circumstances the Distributor will need to capture the additional information when entering the quote manually to pass through to the sell-out data to facilitate the automatic claiming process

6.4 Distributor - Quote Storage

As the “HPE iQuote ID”, “OPG Deal ID” and “Quantity Eligible per unlock rule” are needed to be passed through to the sell-out data, Distributors will need to store this data in their systems.

An important aspect of note here is that any given item can have a quantity eligible per unlock rule and not eligible per unlock rule and Distributor systems will need to handle this split (e.g. row has a quantity of 10 but only 6 are eligible per unlock rule due to maximums defined on the rule by HPE)

6.5 Distributor - Sell-out Data

The sell-out data provided to HPE will need to include the fields HPE iQuote ID”, “OPG Deal ID” and “Quantity Eligible per unlock rule” to support the automated claims process

Distributors will need to modify the generation of sell-out data to include these additional elements

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7. Program Participation - Optional Elements

7.1 Open an iQuote Quote using the iQuote SSO process

A new feature allowing a Distributor to automatically open a quote as part of the SSO process. As iQuote is needed to calculate the unlocked state of a quote (and items in the quote) this provides Distributors with a way to link directly back to the Quote from their basket for any edits and subsequent re-submission to the Distributor cart.

This has been achieved by an additional (optional) field within the iQuote gatekeeper (SSO process). When the HPEQuoteID is specified iQuote will load the specific quote once it opens:

- If the Quote is not locked, the Quote will be edited and this will add the quote back to the iQuote basket
- If the quote is locked, a “Create Next Version” action will be taken on that quote and version, which will add the quote back to the iQuote basket
- If the Quote does not belong to the user logging in, no action will be taken except a message will be shown on the iQuote home page of “Quote not valid for current user”

An updated version of the iQuote “iQuote IT Specifications - Data and Integration” can be found in Appendix 1 where the revised gatekeeper fields can be seen

- GateKeeper changes

```
<div class="row">
            <h1>iQuote2 Gatekeeper Form</h1>
            <form class="form-horizontal" id="gkform" name="gkform" action="https://test.hpiquote.net/aspx/GateKeeper.aspx"
method="post">
                <div class="form-group">
                    <label for="host" class="col-sm-2 control-label">HostID</label>
                    <div class="col-sm-3">
                        <input type="text" class="form-control" name="host" id="host" placeholder="HostID" value="MHPRG121HNU">
                    </div>
                    <div class="col-sm-6 left">
                        <span>Your unique identifier.</span>
                    </div>
                </div>

                <div class="form-group">
                    <label for="token" class="col-sm-2 control-label">Token</label>
                    <div class="col-sm-3">
                        <input type="text" class="form-control" name="token" id="token" value="00000000-0000-0000-0000-000000000000"
placeholder="Token">
                    </div>
                    <div class="col-sm-6 left">
                        <span>The secret key/token provided to you. If security is a concern for you please see our webservice token
based implrmentation.</span>
                    </div>
                </div>

                <div class="form-group">
                    <label for="mfr" class="col-sm-2 control-label">Mfr</label>
                    <div class="col-sm-3">
                        <input type="text" class="form-control" name="mfr" id="mfr" value="HPE" placeholder="Mfr">
                    </div>
                    <div class="col-sm-6 left">
                        <span>Mfr you want to log into.</span>
                    </div>
                </div>

                <div class="form-group">
                    <label for="uEmail" class="col-sm-2 control-label">User Email</label>
                    <div class="col-sm-3">
                        <input type="text" class="form-control" name="uEmail" id="uEmail" value="sandeep.shah@hpe.com">
                    </div>
                    <div class="col-sm-6 left">
                        <span><strong>Key field</strong> - the customer's iQuote account will be created (and subsequently updated)
using the email address as the primary key.</span>
                    </div>
                </div>

                <div class="form-group">
                    <label for="uName" class="col-sm-2 control-label">User Name</label>
                    <div class="col-sm-3">
                        <input type="text" class="form-control" name="uName" id="uName" value="Sandeep Shah">
                    </div>
                    <div class="col-sm-6 left">
                        <span>Customer user's name (The most recent value POSTed will be stamped onto their user account each time they
access).</span>
                    </div>
                </div>

                <div class="form-group">
```


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```
                    <label for="uTel" class="col-sm-2 control-label">Telephone</label>
                    <div class="col-sm-3">
                        <input type="text" class="form-control" name="uTel" id="uTel" placeholder="Telephone">
                    </div>
                    <div class="col-sm-6 left">
                        <span>Customers telephone (updated on each POST).</span>
                    </div>
                </div>

                <div class="form-group">
                    <label for="cAccountNum" class="col-sm-2 control-label">Account Num</label>
                    <div class="col-sm-3">
                        <input type="text" class="form-control" name="cAccountNum" id="cAccountNum" value="1234">
                    </div>
                    <div class="col-sm-6 left">
                        <span>Customer account number- returned to you as a customer identifier (with Add To Basket) - and used (if
cPriceBand is not present) to query your webservice for pricing).</span>
                    </div>
                </div>

                <div class="form-group">
                    <label for="cName" class="col-sm-2 control-label">Reseller Name</label>
                    <div class="col-sm-3">
                        <input type="text" class="form-control" name="cName" id="cName" value="Test Company Name">
                    </div>
                    <div class="col-sm-6 left">
                        <span>Reseller/Company name (The last value POSTED will be updated against their Company (Account Num) each
time they access.</span>
                    </div>
                </div>

                <div class="form-group">
                    <label for="cPCode" class="col-sm-2 control-label">Reseller ZIP Code</label>
                    <div class="col-sm-3">
                        <input type="text" class="form-control" name="cPCode" id="cPCode" value="1111">
                    </div>
                    <div class="col-sm-6 left">
                        <span>Customer's zip code / postcode.</span>
                    </div>
                </div>

                <div class="form-group">
                    <label for="ref" class="col-sm-2 control-label">Return URL</label>
                    <div class="col-sm-3">
                        <input type="text" class="form-control" name="ref" id="ref" value="http://channelcentral.net">
                    </div>
                    <div class="col-sm-6 left">
                        <span>Referring URL. Your website - the URL to which the user will be returned if they press 'Leave
iQuote'.</span>
                    </div>
                </div>

                <div class="form-group">
                    <label for="SessionID" class="col-sm-2 control-label">Session ID</label>
                    <div class="col-sm-3">
                        <input type="text" class="form-control" name="SessionID" id="SessionID" value="">
                    </div>
                    <div class="col-sm-6 left">
                        <span>Your sessionID for the user. Used (if required) to query your webservice) and returned to you in 'place
order' implementations.</span>
                    </div>
                </div>

                <div class="form-group">
                    <label for="BasketURL" class="col-sm-2 control-label">Basket URL</label>
                    <div class="col-sm-3">
                        <input type="text" class="form-control" name="BasketURL" id="BasketURL"
value="http://iquote2.channelcentral.net/formout/default.aspx">
                    </div>
                    <div class="col-sm-6 left">
                        <span>The URL to which completed quotes will be sent (with the Add To Basket button) - The value included here
is just an example URL which will echo the submitted values to screen..</span>
                    </div>
                </div>


                <div class="form-group">
                    <label for="BasketId" class="col-sm-2 control-label">Quote Id</label>
                    <div class="col-sm-3">
                        <input type="text" class="form-control" name="QuoteId" value="200000364274602">
                    </div>
                    <div class="col-sm-6 left">
                        <span>The Quote Id {2000}{quote id}{quote version}</span>
                    </div>
                </div>

                <div class="form-group">
                    <div class="col-sm-2">

                    </div>
                    <div class="col-sm-9 left">
```


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```
                <button type="submit" class="btn btn-default">Submit</button>
            </div>
        </div>
    </form>

</div>
```

7.2 Update a Quote with a "Sold Out" status

iQuote does not currently know when a quote has been sold-out. To solve this a new **optional** API and / or file upload will be provided to mark a quote as "sold-out" within iQuote.

- API
  - RESTful interface
  - Endpoint URLs of:
    - Live endpoint: **https://live.hpiquote.net/internalapi/SMB2QuoteStatus/Update**
    - UAT endpoint: **https://uat.hpiquote.net/internalapi/SMB2QuoteStatus/Update**
  - Input as shown below:
    - ChannelCode - HostID code (e.g. DAD1233)
    - List of QuoteIDs in the HPE Quote ID format
    - SharedSecret (security token – to ensure only users of that channel can access quotes from that channel)
  - Output to be:
    - Summary of Quotes successfully updated
    - List of Quote IDs that could not be updated and why
      - Reasons will be
        - Quote does not exist for the specified channel
        - Quote is already marked as "Sold Out"
  - Once the API is called the function will:
    - Ensure that the shared secret is valid for the channel / host code provided and where not valid return a 401 error
    - Ensure each Quote ID provided is a valid quote **and** valid for the channel / host code specified
    - For each set the status of the quote to #SO ("Sold Out")
    - Keep a list of invalid Quotes and those that did not update
    - Keep a count of quotes that did update
    - Output the count of quotes that updates and the list of quotes that encountered errors
- API Details
  - The API can be accessed following this URL
    - **Request URL: https://uat.hpiquote.net/internalapi/SMB2QuoteStatus/Update**
    - **Request Content Type** : "application/json"
    - **Type: POST**
    - **JSON:**

```
{
  "channelCode" : "DAD1233",     - Channel/ Host Code
  "sharedSecret": "abcdefgh",       - Shared Secret
  "quoteIDs": [
                "200000201898002",
                "200000231452903",
                "200000255321303",          List of Quote IDs
               "200000265593902",
              "200000202281002",
              "200000202281802"
```


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```
                ]
            }
```


- Scenario 1: **Unauthorised** - When the Channel and Secret Key do not match
  - **HTTP Response Code**: 401
  - **Response Body**


```
{
  "Quotes": [
    {
      "QuoteID": "200000201898002",
      "Succeeded": false,
      "FailureText": "Failed Authorisation"
    },
    {
      "QuoteID": "200000231452903",
      "Succeeded": false,
      "FailureText": "Failed Authorisation"
    },
    {
      "QuoteID": "200000255321303",
      "Succeeded": false,
      "FailureText": "Failed Authorisation"
    },
    {
      "QuoteID": "200000265593902",
      "Succeeded": false,
      "FailureText": "Failed Authorisation"
    },
    {
      "QuoteID": "200000202281002",
      "Succeeded": false,
      "FailureText": "Failed Authorisation"
    },
    {
      "QuoteID": "200000202281802",
      "Succeeded": false,
      "FailureText": "Failed Authorisation"
    }
  ],
  "UpdateSuccessful": false,
  "StatusText": "0 Quotes updated successfully"
}
```


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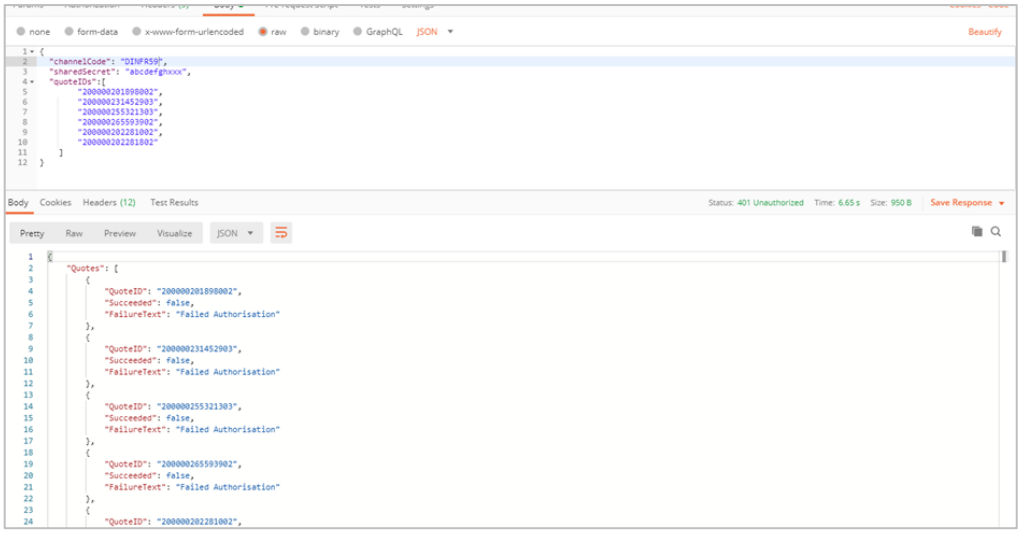
- **Postman Screengrab**



- Scenario 2: **Authorised and One quote mismatch**
  - **HTTP Response Code**: 200
  - **Response Body**:

```
{
  "Quotes": [
    {
      "QuoteID": "200000202281802",
      "Succeeded": false,
      "FailureText": "Failed to update"
    }
  ],
  "UpdateSuccessful": true,
  "StatusText": "5 Quotes updated successfully"
}
```

- File Upload
  - New file upload to the channelcentral FTP site
  - Exact location / credentials
    - File Location are defined in feedread config section but mainly follow this path "<drive>:\sitedata\distfeeds\IQ2"
  - File name to be "[Host Code]_QuoteStatus_yyyyMMddTHHmmss.csv"
    - ISO Standard date / time
    - yyyy = the year the file was created including century
    - MM = the month the file was created to 2 digits left padded with 0 where less than 10
    - dd = the day the file was created to 2 digits left padded with 0 where less than 10
    - T = single value of "T" denoting the separation of date and time
    - HH = the hour the file was created in a 24-hour format to 2 digits left padded with 0 where less than 10
    - mm = the minute the file was created to 2 digits left padded with 0 where less than 10

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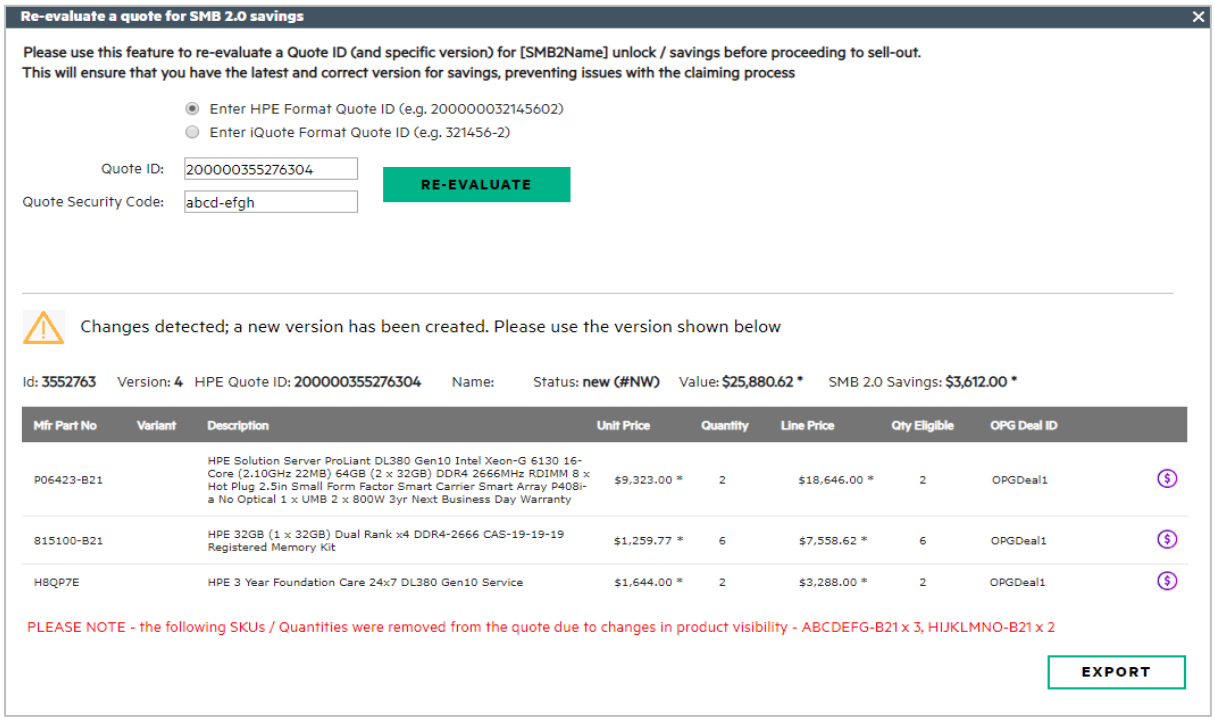
        - ss = the second the file was created to 2 digits left padded with 0 where less than 10
    - Columns will be:
        - Host Code (e.g. DWERG74AH)
        - Shared Secret
        - Quote ID in the HPE Quote ID format
    - File will be processed automatically once received in the FTP folder
    - Processing will use the data in the file to call the Ordered Status API (see above)
    - Error Report : These are stored in Exceptional contains the response from webservice.

7.3 SMB 2.0 Quote Re-evaluation

A user interface feature within iQuote allowing either an iQuote format or HPE format Quote ID to be submitted. Where the SMB 2.0 unlock criteria or OPG details have changed an on screen display of the new Quote version (or the original Quote version where there are no changes) will be displayed allowing the user the ability to re-export the Quote

- UI changes



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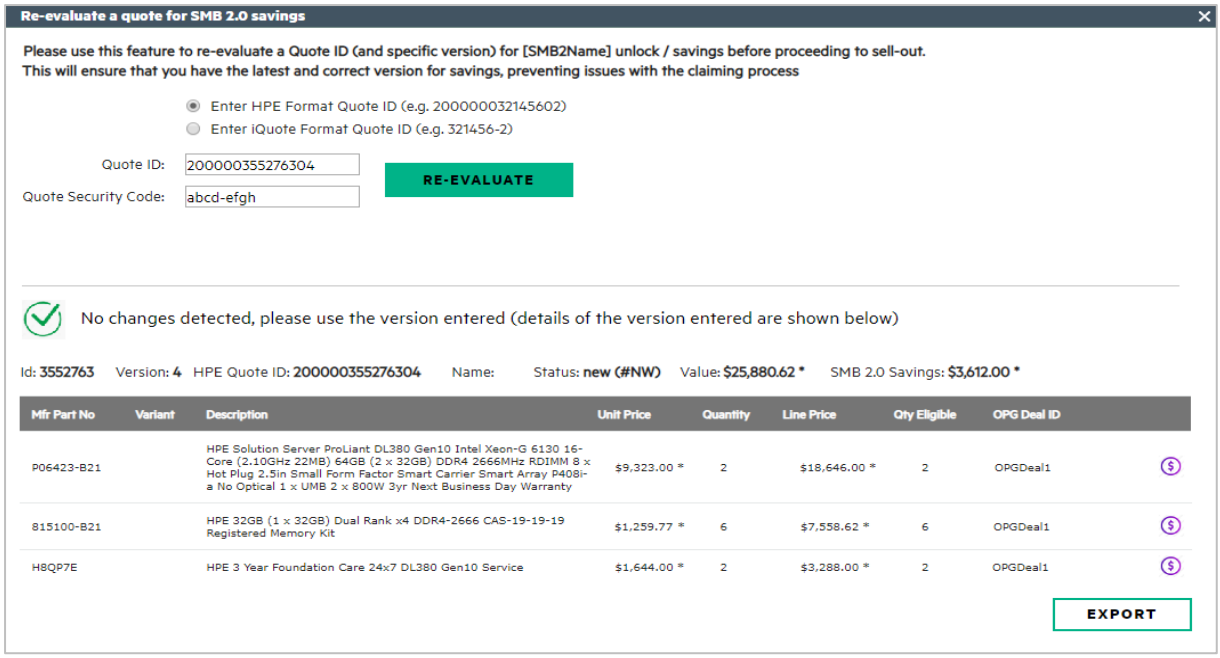

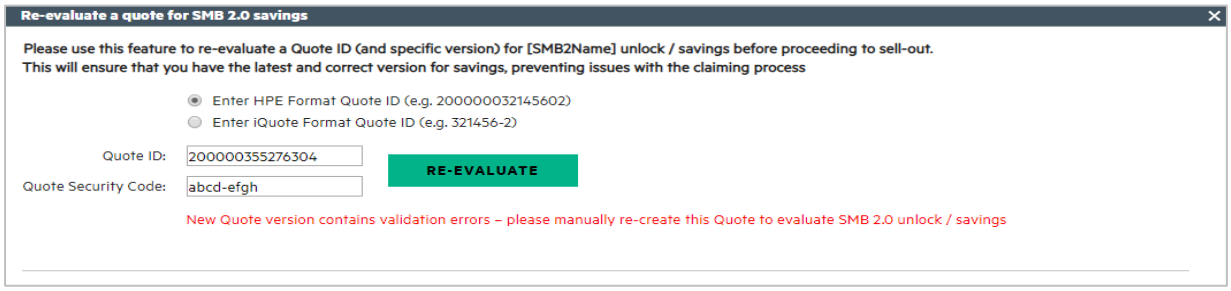

A new web service allowing an HPE format Quote ID to be submitted. Where the SMB 2.0 unlock criteria or OPG details have changed a new version of the quote will be returned and should be used. Where details have not changed the same quote version will be returned

- Web Service
  - Endpoint URLs of:
    - Live endpoint: **https://live.hpiquote.net/SMB2API/SMB2EvaluateQuote**
    - UAT endpoint: **https://uat.hpiquote.net/SMB2API/SMB2EvaluateQuote**
  - RESTful interface
  - Type: GET
  - Input parameters of:
    - ChannelCode - HostID code (e.g. DAD1233)
    - QuoteCode in the HPE Quote ID format
    - SharedSecret (security token – to ensure only users of that channel can access Quotes from that channel)

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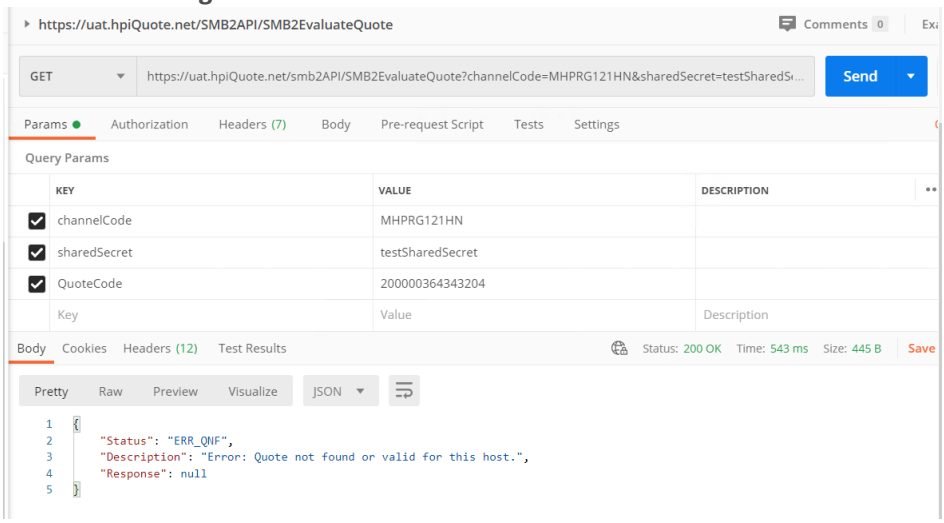
- **Postman Screengrab**



- Output to be:
  - Status Code: A code to identify the success / failure encountered. Values of:
    - Error codes:
      - **ERR_HNF**. Will be returned when the host code provided is not found
      - **ERR_SI**. Will be returned when the security information provided is not correct (Shared secret does not match that stored for the host code)
      - **ERR_QNF**. Will be returned when the Quote ID provided cannot be found or is not valid for the host code provided
      - **ERR_QNV**. Will be returned when the new version of the Quote created for comparison purposes has red critical validation errors
    - Success codes:
      - **OK_NV**. Will be returned when a new version of the Quote is needed to replace the version provided
      - **OK_NC**. Will be returned when a new version of the Quote is **NOT** needed and there are no changes to the Quote provided
  - Status description: A text string in English providing a readable form of the error code. Values of:
    - Error descriptions:
      - "Error: Host code provided not found". Relates to the error code of "ERR_HNF"
      - "Error: Security information incorrect". Relates to the error code of "ERR_SI"
      - "Error: Quote not found or valid for this host". Relates to the error code of "ERR_QNF"
      - "Error: New Quote version not valid – red critical validation errors encountered, please create a new version manually within iQuote". Relates to the error code of "ERR_QNV"
    - Success descriptions:
      - "Success: Quote details have changed – please replace the Quote you have with the new version in the response". Relates to the success code of "OK_NV"
      - "Success: No changes detected – please use the Quote version supplied". Relates to the success code of "OK_NC"
  - JSON Structure containing Quote details (original quote where no changes needed, new Quote where changes needed and empty for all errors)
    - Will be empty for statuses of "ERR_HNF", "ERR_SI", "ERR_QNF" and "ERR_QNV"
    - Will be populated with a JSON structure for statuses of "OK_NV" and "OK_NC" in the format of:
      - Quote
        - _ItemsRemoved: String containing a description of the products removed in the format "PLEASE NOTE – The following SKUs were

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removed from the Quote due to product visibility – ABCDEFG-B21 x 3, HIJKLMNO x 2”

- _Supplier: The distributor name
- _CreatorEmail: The Quote creator email address
- _CreatedBy: The quote creator name
- _Name: The Quote name
- _ID: The iQuote Quote ID without version (done to be consistent with the add to basket XML structure)
- _HPEQuoteID: The HPE format Quote ID (with version)
- ProductRemoved: Array of products removed with each having member elements of
  - PartNum: MFR Part number removed
  - Qty: Qty removed
- Product: Array of products in the Quote
  - SystemID: The grouping of “green squares (parent system / option relationship)
  - Class: The type of product (System Unit or Option Type e.g. “Memory”
  - PartNum: The MFR part number
  - SupplierPartNum: The Distributor internal part number
  - Description: The iQuote description of the part number
  - Qty: The line quantity of the product
  - Price: The Distributor price for the part number as stored on the Quote
  - ListPrice: The HPE list price of the part number
  - OPGref: The OPG Deal ID
  - OPGEnds: The OPG Deal ID end date
  - OPGQty: The quantity eligible per unlock rule
  - RebateValue: The savings value stored against the Quote
  - URLProductImage: The URL for the image of the product
  - URLProductSpecs: The URL for the technical documentation of the product

○ JSON


```
{
  "Quote": {
    "_ItemsRemoved": "PLEASE NOTE – The following SKUs were removed from the Quote due to product visibility – ABCDEFG-B21 x 3, HIJKLMNO x 2",
    "_Supplier": "JG Computo",
    "_CreatorEmail": "test1@channelcentral.net",
    "_CreatedBy": "QA Test Admin a",
    "_Name": "",
    "_ID": "3552763",
    "_HPEQuoteID": "2000000355276301",
    "ProductRemoved": [
      {
        "PartNum": "ABCDEFG-B21",
        "Qty": "3"
      },
      {
        "PartNum": " HIJKLMNO -B21",
        "Qty": "2"
      }
    ],
    "Product": [
      {
        "SystemID": "1",
        "Class": "System unit",
        "PartNum": "P06423-B21",
        "SupplierPartNum": "P06423-B21",
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        "Qty": "2",
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        "RebateValue": "2220",
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        "URLProductSpecs": "\"http://h20195.www2.hpe.com/v2/GetDocument.aspx?docname=a00008180enw\""
      },
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8. Appendix 1 - “iQuote IT Specifications - Data and Integration”

iQuote IT Specifications - Data

9. Appendix 2 – iQuote Quote Export Sample

Export20191219104952.ods

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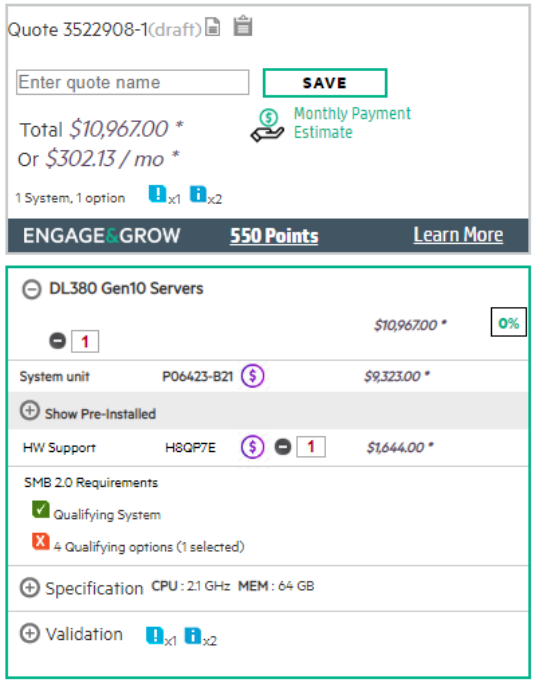
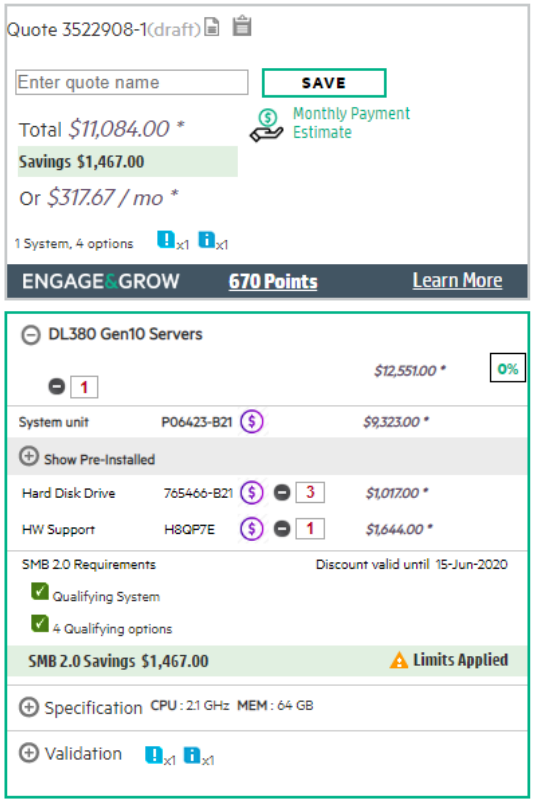
10. Appendix 3 - Sample iQuote basket presentation of unlock criteria, progress towards unlock and savings





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