iQuote User Guide

HPI 1.0

01 December 2016

hp iQuote

Contents

1.   Introduction to this User Guide

Welcome to the HP Inc. (HPI) iQuote User Guide. This document has been put together to help guide you through the features of the tool. If you are new to iQuote or if you are only used to using certain features of the tool, this guide will provide you with everything you need to make the most of the fantastic benefits it will bring you.

Please note that any promotions shown in this Guide are Region Specific. If you're unsure of which promotions apply to your region please refer to your Partner Business Manager.

2.   Introduction to iQuote

The iQuote Configure, Price, Quote tool helps Distributors and Resellers around the world to grow their HPI business by increasing revenue and margin through options attach, increasing quote accuracy and reducing quotation turnaround time.

iQuote has a user friendly approach to quoting HPI products. The tool caters for all levels of user capability – from the inexperienced through to HPI expert, with flexible interfaces containing different content levels. iQuote gives

users increased flexibility and functionality when creating a quote, along with technical validation checks to ensure content accuracy.

iQuote Homepage

This is the iQuote homepage. From here you can start a new quote, access saved/draft quotes, change your account settings, browse all the product families or access the tools and resources sections. All of which will be explained in this guide.
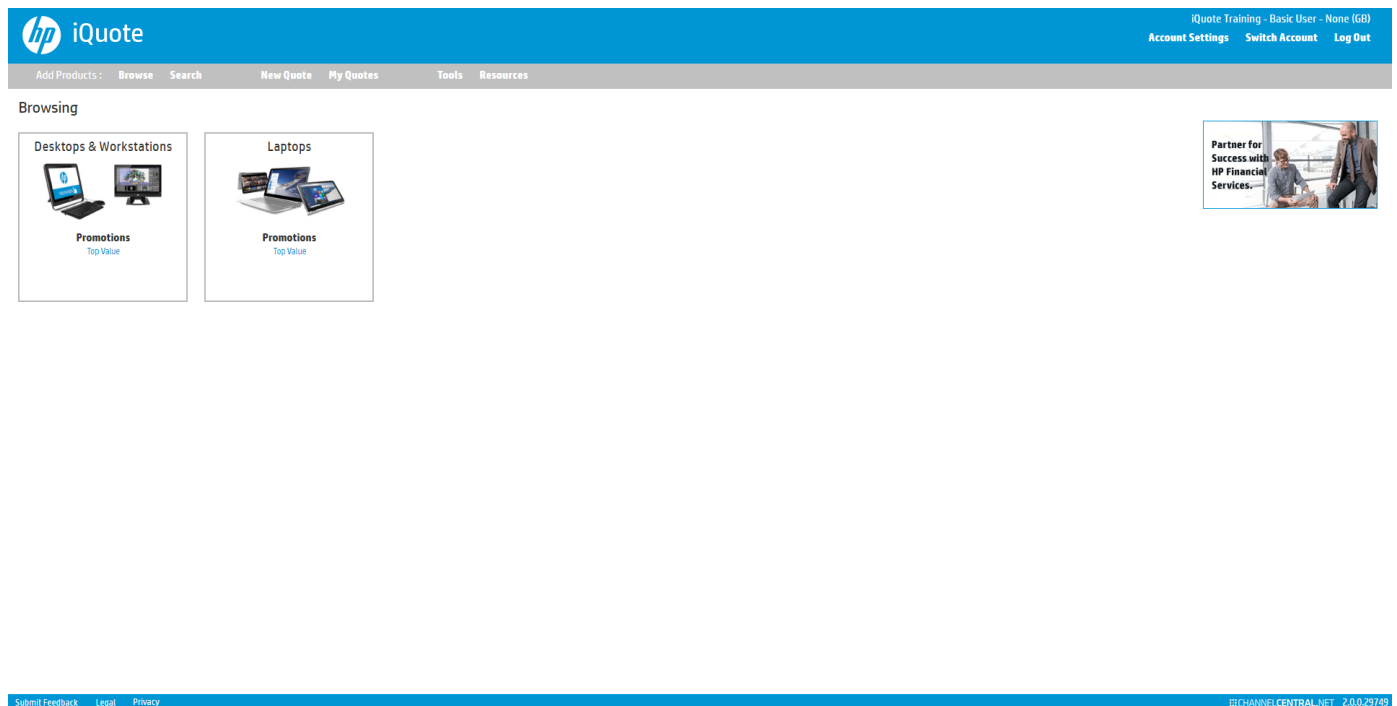

3. How to create a New Quote

In this section we will show you how to start a new quote and we'll talk you through the configuration process as well as all the different functionalities you can expect to see and use within the tool to create the perfect solution.

3.1 Launching a New Quote

Once you are logged into iQuote, you are presented with the Homepage, you can start a New Quote immediately by making a product selection. Or if you want to launch a New Quote from elsewhere in the tool, you can do so by clicking on **New Quote** which will always be at the top of the screen as shown below.
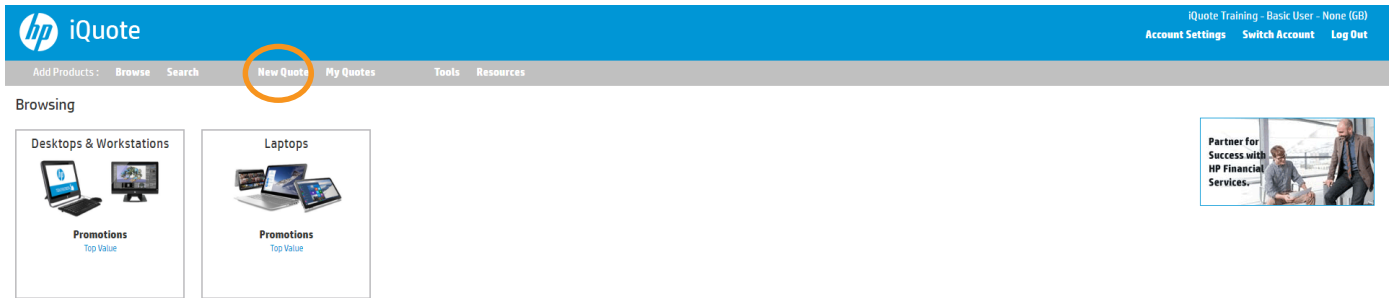
3.2   Selecting a Product Family

There are a number of ways from the Homepage that you can start a search for a product family. This provides flexibility to the user based on preference or amount of information given in the customer requirements.

3.2.1   Select by Product Area

On the Homepage you are presented with all of the available Product Areas in iQuote, presented in large tiles. Click on the chosen Product Area:
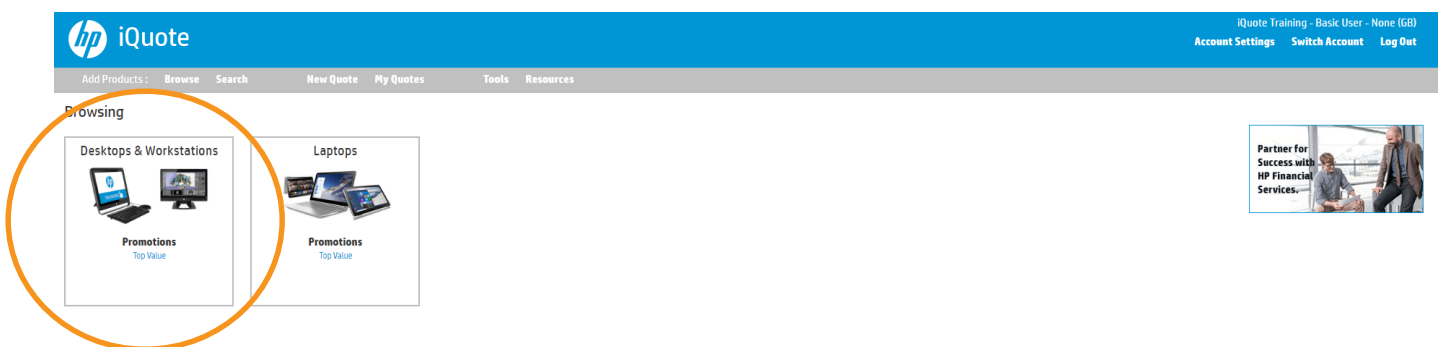
Once you have clicked on the chosen Product Area iQuote will take you to the following screen which shows you all of the Product Families:

Select the Product Family you wish to quote. iQuote will then take you through to the Product Family View. Here you are presented with individual available models. This is the default view; however, you can switch to display different views by clicking on the view switcher. *See section 3.3 of the User Guide.*

On this default view, you can review the detailed specification of any model by clicking the expand button shown and then 'expand Specification'.

When, you are ready to select a model for configuration, you can click the green plus button to select one system unit or enter the unit quantity in the box. iQuote will automatically take you through to the current configuration where you can view the current product selection and continue with a configuration until you are happy to save the quotation.

3.2.2   Select by Product Attribute/Icon

Throughout the tool some product specifics will be highlighted to you with icons. Here are the ones to look out for:

TV = Top Value (Region Specific)

SB = Smart Buy (Region Specific)

WW = Worldwide Regular models

F = FlexAttach (Region Specific)

= Best Sellers (Region Specific)

= Energy Star Certified

= High Performance Product

= Touch Screen
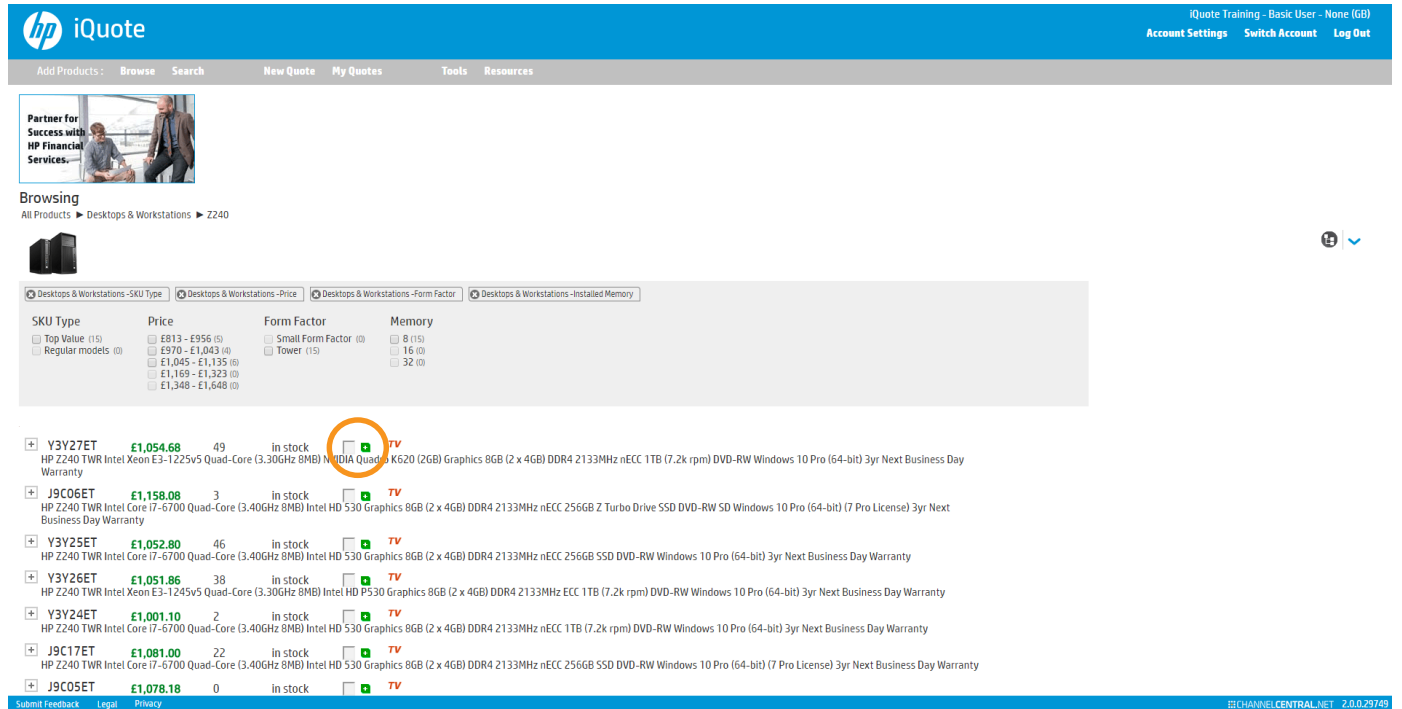
= Multi Card Reader

3.2.3 Search by Filter

This view is guided selling and it can be selected from various points within iQuote.

After selecting a product area, if you don't know which family will meet your needs, you can use the filters to narrow down your choices. While making selections in the filters, some choices won't be available for further selection as iQuote automatically runs intelligent compatibility checks in the background. The remaining families below will be those with at least one model matching the filters. Choose from one of these results by clicking on the tile.

You will then be taken through to the Product Family View for detailed specification, price, stock and availability. Select a model for configuration by clicking the green plus button to select one system unit or enter the unit quantity in the box.

iQuote will automatically take you through to a new screen where you can view the current quote and continue with a configuration until you are happy to save the quotation.

3.2.4   System Search

From the Homepage, if you know the product you are looking for, you can click on **Search** and type the criteria into the Search field:

Within this box, you can type a system part number in order to jump straight to a quote for that part. Alternatively, you can type a Product name e.g. EliteDesk or you can further refine the search and type 705. iQuote will then return results relating to the search:

Systems Search

Search: EliteDesk

▶ Desktops & Workstations ▶ elitedesk 705 G2 ▶ M9B17ET HP elitedesk 705 G2 SFF AMD A8-Series A8-8650B Dual-Core (3.20GHz 4MB) AMD Radeon R7 Graphics 4GB (1 x 4GB) DDR3 1600MHz (LV) 500GB (7.2k rpm) DVD-	£417.36	39in stock		
▶ Desktops & Workstations ▶ elitedesk 705 G2 ▶ M9B21EA HP elitedesk 705 G2 SFF AMD A4-Series A4-8350B Dual-Core (3.50GHz 1MB) AMD Radeon R5 Graphics 4GB (1 x 4GB) DDR3 1600MHz (LV) 500GB (7.2k rpm) DVD-	£473.76	7in stock		
▶ Desktops & Workstations ▶ elitedesk 705 G2 ▶ P6S27AW HP elitedesk 705 G2 SFF AMD A8-Series A8-8650B Quad-Core (3.50GHz 1MB) AMD Radeon R7 Graphics 8GB (2 x 4GB) DDR3 1600MHz (LV) 500GB (7.2k rpm) DVD-	£456.84	5in stock		
▶ Desktops & Workstations ▶ elitedesk 705 G2 ▶ P6S28AW HP elitedesk 705 G2 SFF AMD A10-Series A10-8750B Dual-Core (3.60GHz 4MB) AMD Radeon R7 Graphics 4GB (1 x 4GB) DDR3 1600MHz (LV) 500GB (7.2k rpm) DV	£524.52	17in stock		
▶ Desktops & Workstations ▶ elitedesk 705 G2 ▶ M9B23EA HP elitedesk 705 G2 SFF AMD A4-Series A4-8350B Dual-Core (3.50GHz 1MB) AMD Radeon R5 Graphics 4GB (1 x 4GB) DDR3 1600MHz (LV) 500GB (7.2k rpm) Wind	£532.98	43in stock		
▶ Desktops & Workstations ▶ elitedesk 705 G2 ▶ P6S29AW HP elitedesk 705 G2 SFF AMD A8-Series A8-8650B Dual-Core (3.20GHz 4MB) AMD Radeon R7 Graphics 8GB (2 x 4GB) DDR3 1600MHz (LV) 500GB (7.2k rpm) DVD	£456.84	31in stock		
▶ Desktops & Workstations ▶ elitedesk 705 G2 ▶ P6S30AW HP elitedesk 705 G2 SFF AMD A10-Series A10-8750B Dual-Core (3.60GHz 4MB) AMD Radeon R7 Graphics 8GB (1 x 8GB) DDR3 1600MHz (LV) 128GB SED SSD DVD	£523.58	41in stock		
▶ Desktops & Workstations ▶ elitedesk 705 G2 ▶ M9B24EA HP elitedesk 705 G2 MT AMD A8-Series A8-8650B Dual-Core (3.20GHz 4MB) AMD Radeon R7 Graphics 4GB (1 x 4GB) DDR3 1600MHz (LV) 500GB (7.2k rpm) DVD-	£575.28	27in stock		
▶ Desktops & Workstations ▶ elitedesk 705 G2 ▶ M9B18EA HP elitedesk 705 G2 MT AMD A10-Series A8-8750B Dual-Core (3.60GHz 4MB) AMD Radeon R7 Graphics 4GB (1 x 4GB) DDR3 1600MHz (LV) 500GB (7.2k rpm) DVD	£518.88	0in stock		
▶ Desktops & Workstations ▶ elitedesk 705 G2 ▶ M9B20EA HP elitedesk 705 G2 MT AMD A8-Series A8-8650B Quad-Core (3.50GHz 1MB) AMD Radeon R7 Graphics 8GB (2 x 4GB) DDR3 1600MHz (LV) 500GB (7.2k rpm) DVD-	£541.44	0in stock		
▶ Desktops & Workstations ▶ elitedesk 705 G2 ▶ P6S25AW HP elitedesk 705 G2 MT AMD A8-Series A10-8750B Dual-Core (3.60GHz 4MB) AMD Radeon R7 Graphics 8GB (1 x 8GB) DDR3 1600MHz (LV) 128GB SED SSD DVD-F	£502.90	26in stock		
▶ Desktops & Workstations ▶ elitedesk 705 G2 ▶ M9B22EA HP elitedesk 705 G2 MT AMD A4-Series A4-8350B Dual-Core (3.50GHz 1MB) AMD Radeon R5 Graphics 8GB (2 x 4GB) DDR3 1600MHz (LV) 500GB (7.2k rpm) DVD-	£586.56	46in stock		
▶ Desktops & Workstations ▶ elitedesk 705 G2 ▶ P6S26AW HP elitedesk 705 G2 DM AMD A6-Series A6-8500B Dual-Core (1.60GHz 1MB) AMD Radeon R5 Graphics 4GB (1 x 4GB) DDR3 1600MHz (LV) 500GB (7.2k rpm) Intel 8	£501.96	0in stock		
▶ Desktops & Workstations ▶ elitedesk 705 G2 ▶ T4J34EA HP elitedesk 705 G2 DM AMD A8-Series A8-8600B Quad-Core (1.60GHz 2MB) AMD Radeon R7 Graphics 4GB (1 x 4GB) DDR3 1600MHz (LV) 500GB (7.2k rpm) Intel I	£484.10	19in stock		
▶ Desktops & Workstations ▶ elitedesk 705 G2 ▶ T4J35EA HP elitedesk 705 G2 DM AMD A12-Series A12-8800B Quad-Core (2.10GHz 2MB) AMD Radeon R7 Graphics 4GB (1 x 4GB) DDR3 1600MHz (LV) 256GB SSD Intel 802.	£509.48	0in stock		
▶ Desktops & Workstations ▶ elitedesk 705 G2 ▶ T4J37EA HP elitedesk 705 G2 DM AMD A12-Series A12-8800B Quad-Core (2.10GHz 2MB) AMD Radeon R7 Graphics 8GB (1 x 8GB) DDR3 1600MHz (LV) 256GB SSD Intel 802.	£659.88	22in stock		
▶ Desktops & Workstations ▶ elitedesk 705 G2 ▶ T4J65EA HP elitedesk 705 G2 DM AMD A12-Series A12-8800B Quad-Core (2.10GHz 2MB) AMD Radeon R7 Graphics 4GB (1 x 4GB) DDR3 1600MHz (LV) 1TB SSHD Intel 802.1	£664.58	36in stock		
▶ Desktops & Workstations ▶ elitedesk 800 G2 ▶ P1G15ET HP elitedesk 800 G2 DM Intel Core i5-6500T Quad-Core (2.50GHz 6MB) Intel HD 530 Graphics 4GB (1 x 4GB) DDR4-2133MHz 500GB (7.2k rpm) Broadcom 802.11a	£646.51	0in stock		
▶ Desktops & Workstations ▶ elitedesk 800 G2 ▶ P1G17EA HP elitedesk 800 G2 DM Intel Core i7-6700 Quad-Core (3.40GHz 8MB) Intel HD 530 Graphics 16GB (2 x 8GB) DDR4-2133MHz 256GB SED SSD Broadcom 802.11ab	£1,096.04	30in stock		
▶ Desktops & Workstations ▶ elitedesk 800 G2 ▶ P1G33EA HP elitedesk 800 G2 DM Intel Core i3-6100T Dual-Core (3.30GHz 4MB) Intel HD 530 Graphics 4GB (1 x 4GB) DDR4-2133MHz 500GB (7.2k rpm) Broadcom 802.11a	£726.62	36in stock		
▶ Desktops & Workstations ▶ elitedesk 800 G2 ▶ P1G34EA HP elitedesk 800 G2 DM Intel Core i5-6500T Quad-Core (2.50GHz 6MB) Intel HD 530 Graphics 8GB (1 x 8GB) DDR4-2133MHz 128GB SED SSD Broadcom 802.11ab	£717.22	12in stock		

Showing the first 20 of 851 results. Please add keywords to refine your search
167 milliseconds

Once you have identified the product you are searching for, click on the add button, or enter the quantity into the box. iQuote will then automatically take you through to the current quote where you can view the current product selection and continue with a configuration until you are happy to save the quotation.

3.3 Choosing the Screen View

There are a number of different Screen View options for you to use while creating a quotation. You have the option to change the way you view the products within iQuote at certain points in the configuration. To change the way you view the products, click on the icon shown below:

You can then choose from Branches, Grid or Squares. You can also choose Filter as shown in **Section 3.2.3.**

3.3.1   Branches View

The Branches View allows you to view the Product Families within the chosen Product Area. You then have the added functionality to select ⊕ and expand the current view to display all of the individual models available within the current Product Family with the option to filter. View the following two images:
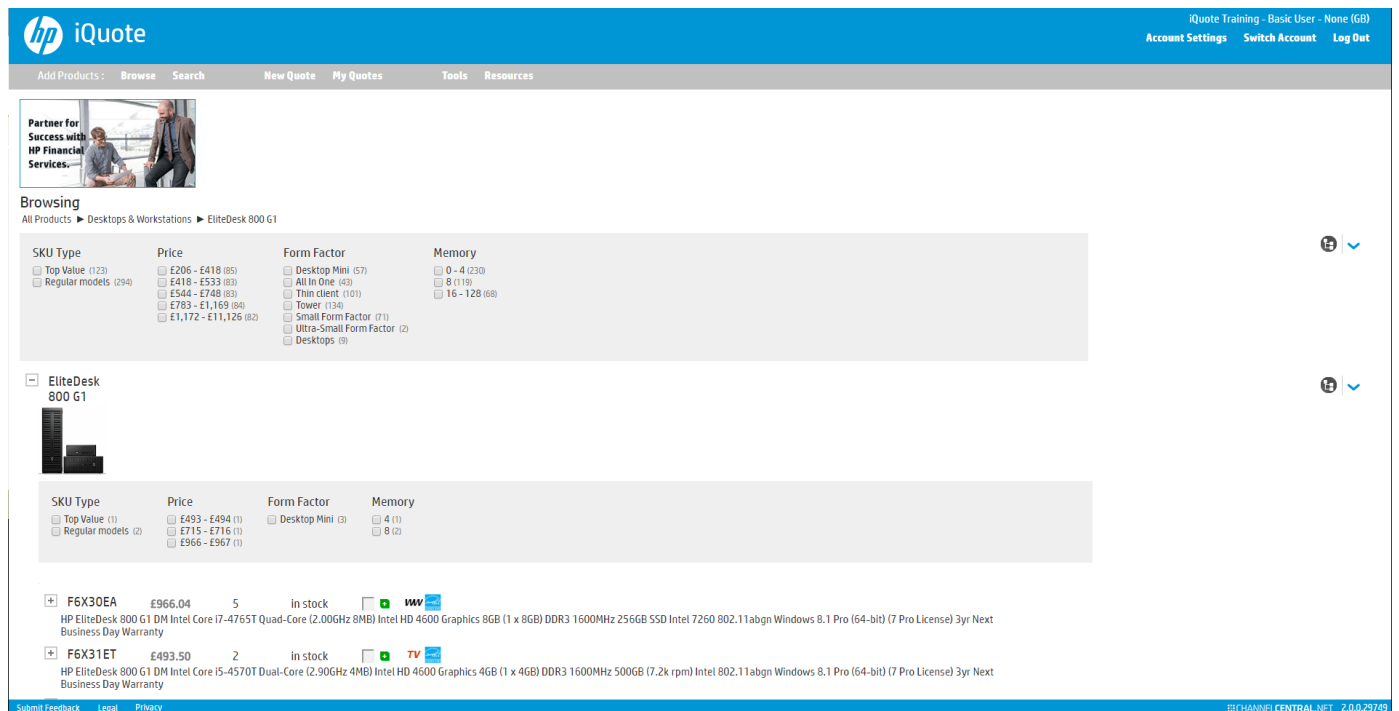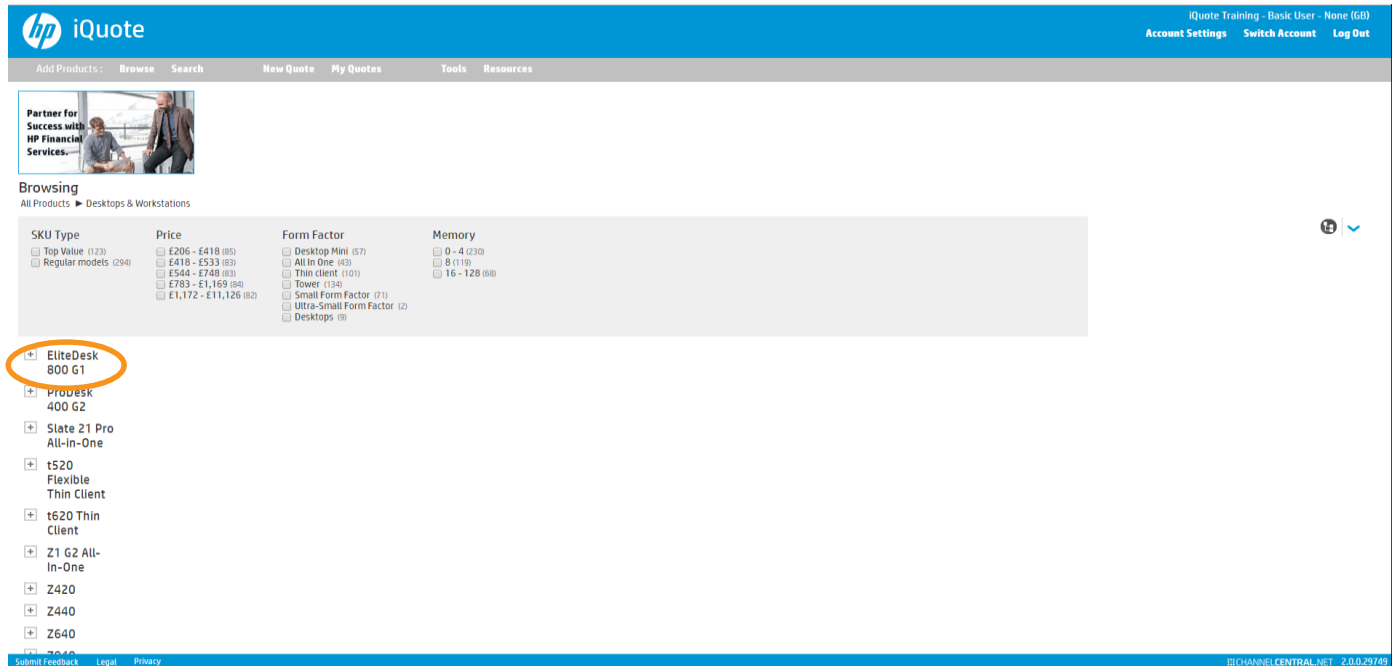
3.3.2   Grid View

In the Grid View products are listed with a detailed breakdown of individual product attributes. The Grid View can be used to distinguish minor or major product specification differences between models. Each column can be hidden if less information is required on the screen by clicking on this icon ✈ . Each feature category heading can be sorted to filter results by using the drop down or by using this icon ▲▼ . To switch between the columns you want to filter by, make a selection using the drop down.

3.3.2.1   Exporting a price list

Also in Grid View is the functionality to export a price list. Simply click on the Export icon as highlighted below:

You will then be able to Open or Save a Microsoft Excel document listing all of the product attributes and prices.

3.3.3   Squares View

The Squares view shows you all of the Product Families in the chosen Product Area and an image of the Product. iQuote also provides a top-level pricing and specification summary for each Product Family in this view, to further guide you.

The information shown is grouped as shown:

You can then make a selection and click through to start the configuration.

3.4   Adding to Current Quote

From all of the screen views, you can add the chosen product to the current quote by clicking the ⊞ button or to

add multiple quantities, type into the box `3` and then click the ⊞ button or press 'enter' on the keyboard.

Once you have added a product to the current quote, iQuote will add a section in the quote for that system, and the left side of the screen will change to allow you to see the specification and search/add options to the selected system:

© channelcentral.net
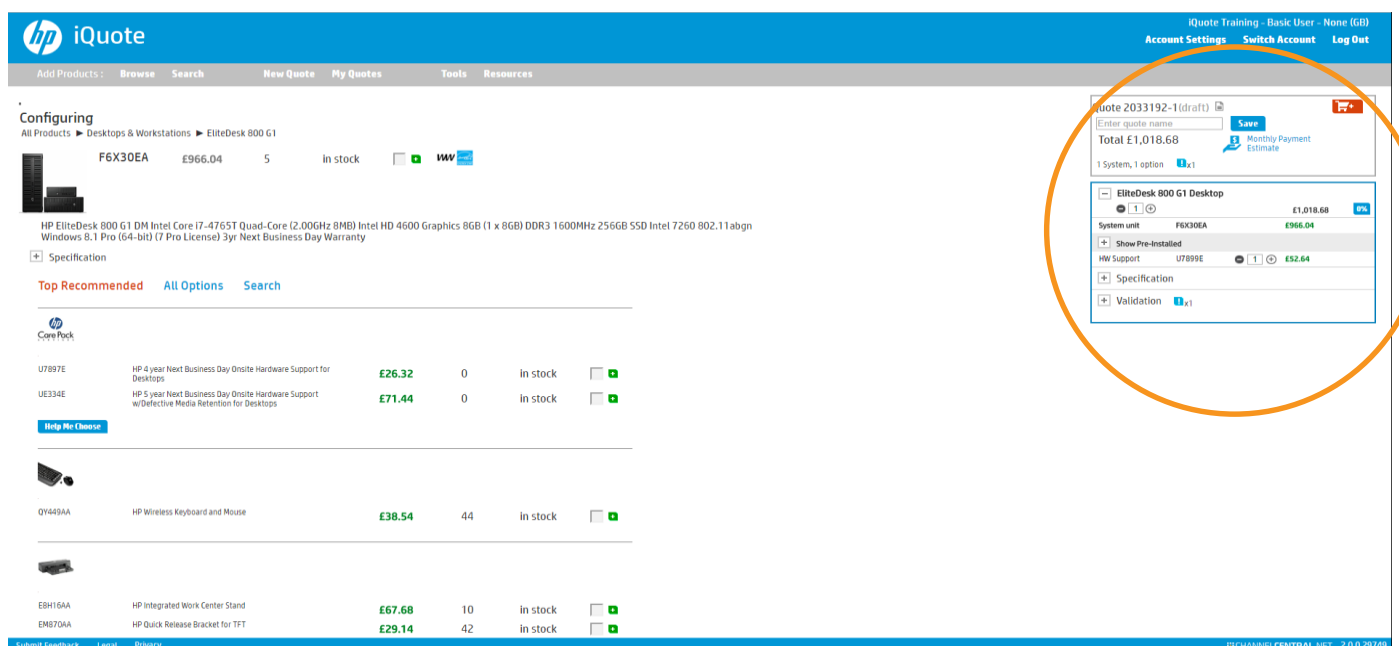
3.5   Adding Multiple Systems to Current Quote

A new feature in iQuote is the ability to quote for more than one system type in a given quote. While working on the current quote, it is now possible to click on 'Browse' or 'Search' and add a Notebook product to a Desktop quote for example:

Quote 2033192-1(draft)

Enter quote name   **Save**

Total £1,904.16   Monthly Payment Estimate   **0%**

2 systems, 1 option   **!**x2 **?**x1

EliteDesk 800 G1 Desktop

⊖ 1 ⊕   £1,018.68   **0%**

System unit   F6X30EA   £966.04

➕ Show Pre-Installed

HW Support   U7899E   ⊖ 1 ⊕   £52.64

➕ Specification

➕ Validation   **!**x1

MT42 Mobile Thin Client Notebook

⊖ 1 ⊕   £885.48   **0%**

System unit   Y5X56EA   £885.48

➕ Show Pre-Installed

➕ Specification
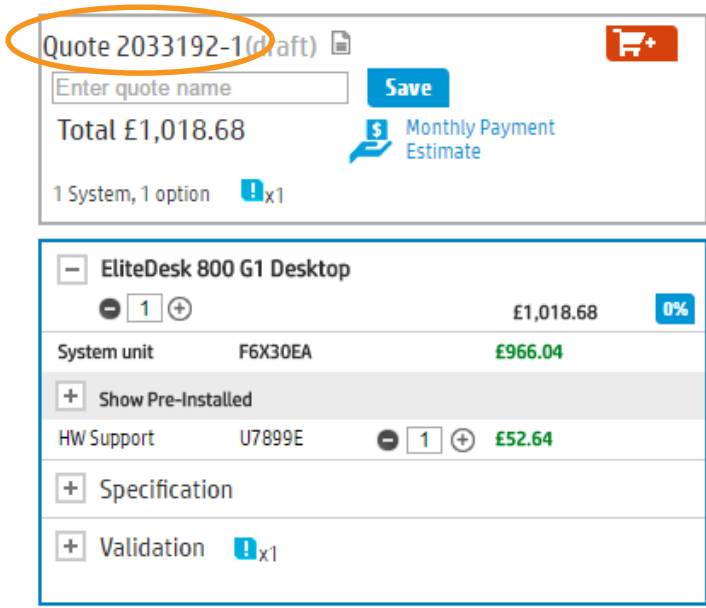
➕ Validation   **!**x1 **?**x1

The blue box highlights the system you are working on. To change to the other system, simply click on it and the blue box will highlight it, and the left side of the screen will change to allow you to configure that system.

4. Guiding you through the quote

4.1 The Quote

Here iQuote shows the quote ID. This is an individual reference number for revisiting a quote at a later date. A total price for the configuration (which dynamically updates as you add / remove systems and options) is also shown.

4.2 System Multiplier

By using the plus and minus buttons under the title of a selected system in the quote, it is possible to add additional systems of the same type or decrease the number of systems. Changing this number multiplies the fully configured system, so you effectively have the specified number of copies of the same configuration. If you need the same system model, but with a different configuration, you use the grey ⊕ next to the model name on the left side of the screen which will add a new, separate system square to the quote. Clicking the minus ⊖button when the quantity is 1 will remove the system square from the quote altogether.

4.3   Pre-Installed and Auto-Add Options

In each system square in the quote, a Pre-Installed section is present that can be expanded to show some of the most relevant options that are pre-installed into the system unit SKU from the factory. These can be viewed by expanding the grey 'Show Pre-Installed' section of the quote as shown.

Also, depending on the system model, you may see, below the Pre-Installed options, one or more other options already added the quote, such as Hardware Support Service or an Operating System for servers.   These are present in cases where HPI highly recommends that certain options should be included for the best customer experience.
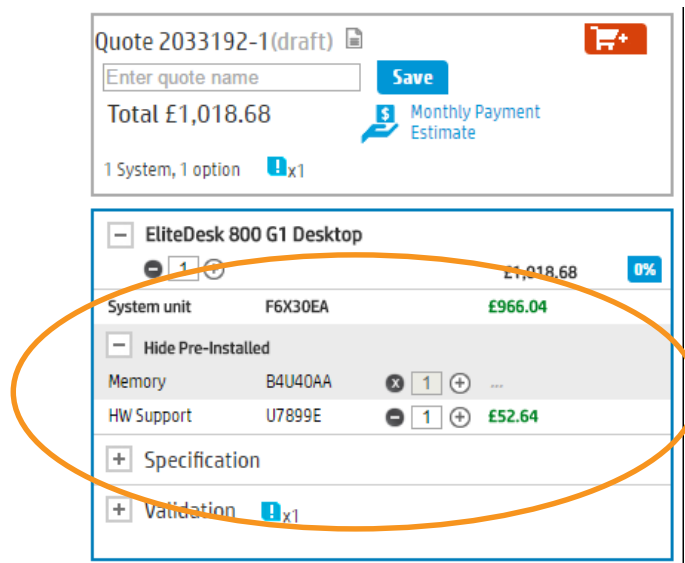
4.4   Adding/Removing Options

In order to achieve the required system configuration, you can to add or remove options to/from the selected system in several ways: selecting from Top Recommended options, browsing All Options, using options Search, and directly manipulating the quantity of options in the basket.
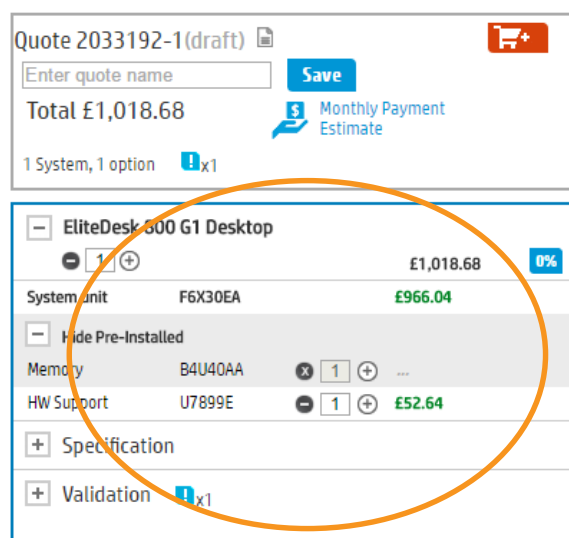
4.4.1 Direct Manipulation of Options for a System
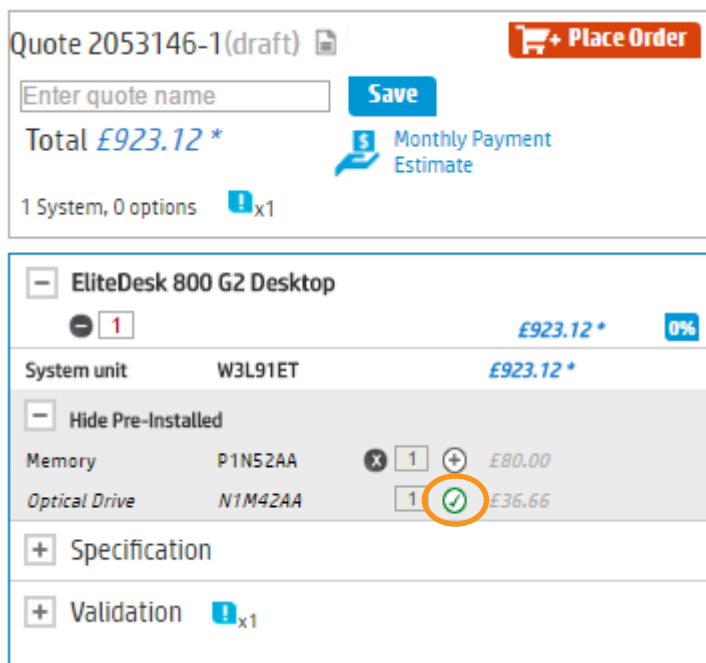
Within the selected system of the current quote, you will see the Pre-Installed system components as mentioned in 4.3 and as well as "attached" options which include any Auto-Add options, plus options added using any of the methods described below. From either type of option, you can click ⊕ to add one more of the associated option to the system. Since the quantity of Pre-Installed options cannot be changed (It's how the system unit was configured from the factory), clicking this control for a Pre-Installed option will add a row for the selected part number to the list of options below the Pre-installed section.   Clicking ⊕ on any of the attached options will simply increase the quantity by 1.

For attached options, you can directly enter the desired quantity into the box and press Enter to apply. You can also decrease the quantity by clicking ⊖. Clicking this when the displayed quantity is 1 will cause the option row to be removed from the quote.

As options quantities change, iQuote will constantly evaluate and verify that the configuration is valid and that you can successfully install all of the attached options into the system unit upon delivery.   If there are any rule violations, you will see Technical Validation Notes which are discussed later in this document.

To further help you achieve the desired configuration, iQuote has a feature that allows you to "Remove from Validation" any of the Pre-installed options.   To remove a Pre-Installed option from validation, click ⊗, and to re-include that option in the technical validation click ✅.   An example use of this feature is when you plan to remove a factory installed part after delivery then replace it with one of the added options, and you want the validation to properly consider this intention.

Finally, to help you find and add options, clicking any of the options already in the quote will cause the left side of the screen to navigate to that option category.

4.4.2   All Options

To browse the full catalogue of options compatible with the currently selected system click on **All Options** and from here you will be presented with a number of categories that you can tab through to make a selection.

Top Recommended	All Options	Search						
System	Storage	Accessories	Expansion	Rack & Power	Services	Software	Miscellaneous	

Hardware Kit   Power Supply

4.4.3   Options Search

If you know which options you would like to add, simply click on **Search** and a search box will appear to type the requirements, for example the part number or partial description:

Options Search

Search: [   ]
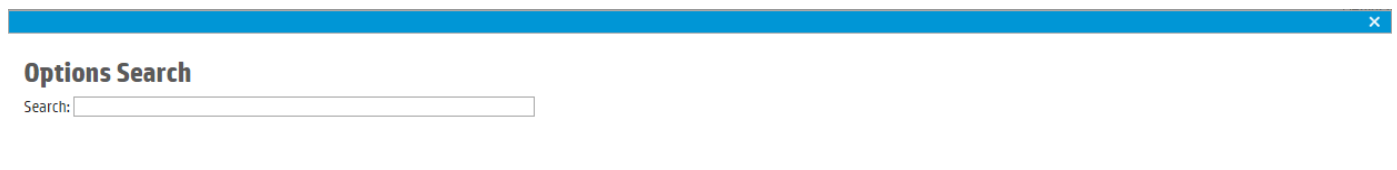
4.4.4   Top Recommended

Upon adding a system to the quote, or upon re-selecting a system, Top Recommended is the default view. This view is designed to provide you with HPI's recommendations or the most popular options in various categories.   For example, for most systems you will see two or three top recommended services for quickly adding to the quote or replacing the Auto-Added support service.

Some Top Recommended categories may have additional features to guide your selection such as the 'Help me Choose' button **Help Me Choose** for Services which links to an enhanced filter and grid view of compatible services.

U7897E	HP 4 year Next Business Day Onsite Hardware Support for Desktops	£26.32	0	in stock		➕
UE334E	HP 5 year Next Business Day Onsite Hardware Support w/Defective Media Retention for Desktops	£71.44	0	in stock		➕

Help Me Choose

QY449AA	HP Wireless Keyboard and Mouse	£38.54	44	in stock		➕

4.4.4.1   Help me Choose Filter

4.5 Promotions

Contained within iQuote are certain Regional/Country as well as Host Specific Promotions. These can be viewed at various stages throughout the configuration process in iQuote.
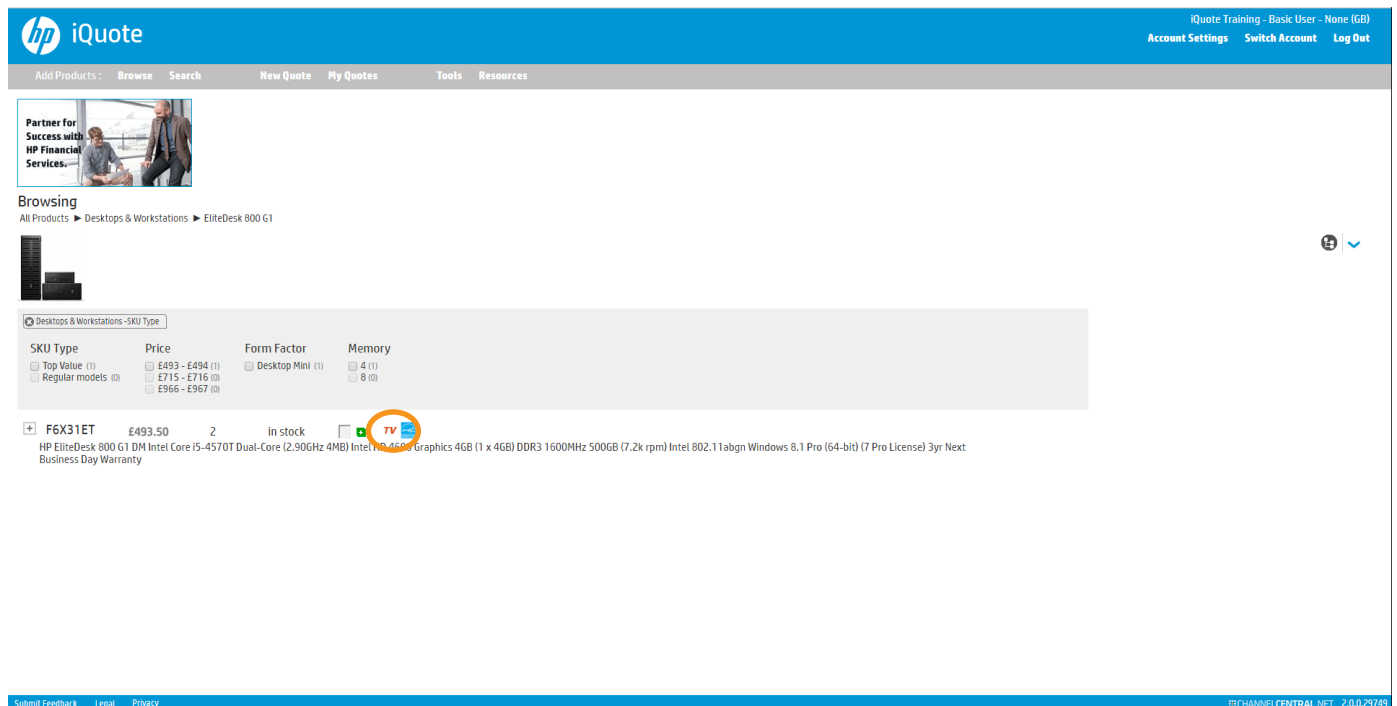
4.5.1 Banners

Banners are placed strategically in iQuote to assist and guide you with Promotions which may be relevant to the quotation. Clicking on these Banners has a variety of different actions, depending on the individual banner in question.

4.5.2 System Selection

While selecting a system to add to the quote, you can see which system are part of **region specific promotions** such as Top Value. For example, Top Value Promotions are available in this Product Family and are highlighted for you by using **TV** .

Alternatively, if using a different view within iQuote, such as Filter, you may start a configuration by selecting a regional promotion such as 'Top Value'. As shown in the following screen shot:
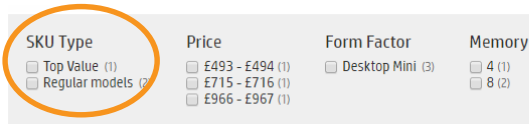
4.6 Technical Validation Notes

iQuote will technically validate a system configuration. The Technical Validation section contains notes to guide you. These ensure that the combination of options you add to the current quote is accurate and does not violate any limits or configuration rules.

When you are in the current quote, you may notice the following symbols which acts as prompts for you to correct the configuration:

🚫x1 Critical Errors

ℹx1 Information or Upsell Recommendations

⚠x1 Warnings

By left clicking on the icons, you will receive detailed Technical Validation Information and Guidance. For Example:

Memory 44 GB ❌
Not enough Memory slots available
Max: 2 (11 Used), Remove
preinstalled to free more slots
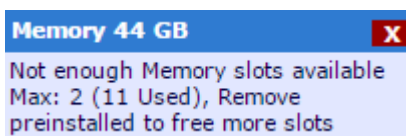
4.7 Specification Notes

To review specification details of a system in a quotation you can do so by clicking on this icon ⊕ and further information will appear as shown which can then be minimized by clicking ⊖ :

[−] Specification

Hard Disk Drive 500GB (1 slots of 2)

Optical Drive (1 slots of 1)

Processor (0 slots of 1)
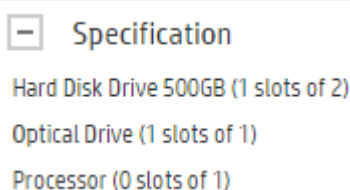
4.8 Margin

The margin button allows you to add a sale margin to the system unit, and for any additional options and accessories you have added. You can do so by clicking on this icon 0% and then entering the margin into the box provided as shown here:

By clicking 'Apply' you will see that the margin has been applied to each line, as show below:

If you need to increase or reduce the margin on individual lines in a quotation you can do so by clicking on the margin icon on that line in the quotation and you will have the option to amend it, as shown below:

4.9   Financing Payment Estimator

In the current quote you may see this icon which is located underneath the save button. Once you click on this icon a box will appear on screen as shown below:

You can change the lease term and type by using the drop down arrows. If you change any of the terms, click the

UPDATE RESULTS button to ensure the correct value is shown.

If you decide to proceed with HPI Financial Services, then save the current quote and call the telephone number indicated on the HPI Financial Service Screen as shown below:

4.10   Quote Header

Along the top of the current quote in iQuote you have a number of actions to choose from for when you have finished a quotation or need to pause working on it. Once these functions have been performed a message will temporarily appear to tell you the action has been taken.

4.10.1 Save

iQuote will let you save a quotation at any point after the base system has been added. Using this facility will allow you to return to this quotation at a later stage. To save the quote, type in a quote name and click save:
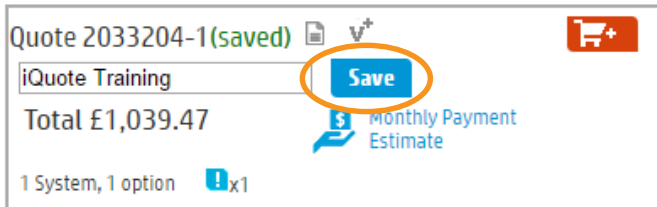
4.10.2 Export

The Export function [icon] in iQuote enables you to produce a quotation in different document formats. **Please note you will need to ensure there are no technical validation errors.** A quote can be exported in a number of formats as shown in the screen shot below:
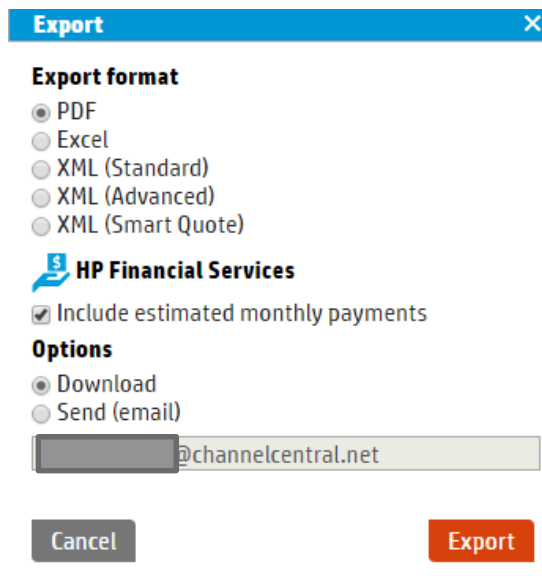
4.10.3   Email

The Email function enables you to send a quotation straight to an email inbox. **Please note you will need to ensure there are no technical validation errors.** Simply click on the Export function 📄 , and an email address will automatically appear based on the login credentials. Click on 'Export'.
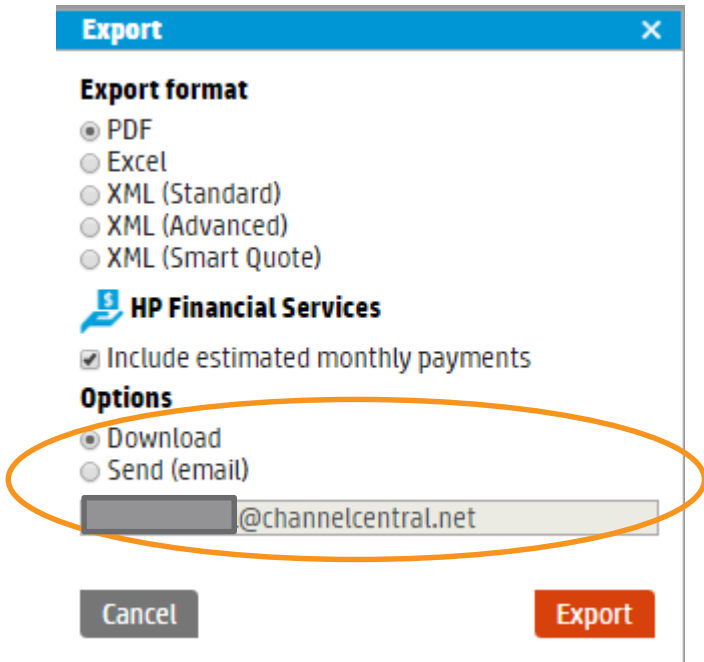
4.10.4   Add to Basket

If the iQuote service is hosted within a supplier's Web Store, you will be able to add the quotation to the Supplier's shopping basket and make a purchase seamlessly from the quotation. In this case, if this service is enabled, you will see this button: 🛒 By clicking 🛒 you will be taken through to the iQuote supplier's original Web Store, to complete the purchase. The bill of materials and pricing contained within the quote will be passed through to the Supplier's eCommerce facility enabling you to complete the transaction.

4.10.5   V+ Symbol

If a quotation shows the following V+ Symbol, it means you can create a new version of the same quotation. This is especially useful if you want to send multiple quotes to a customer for comparison:
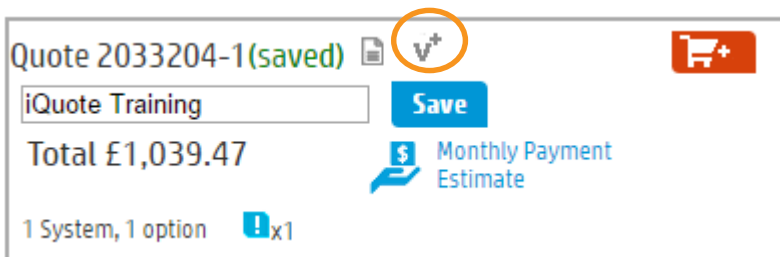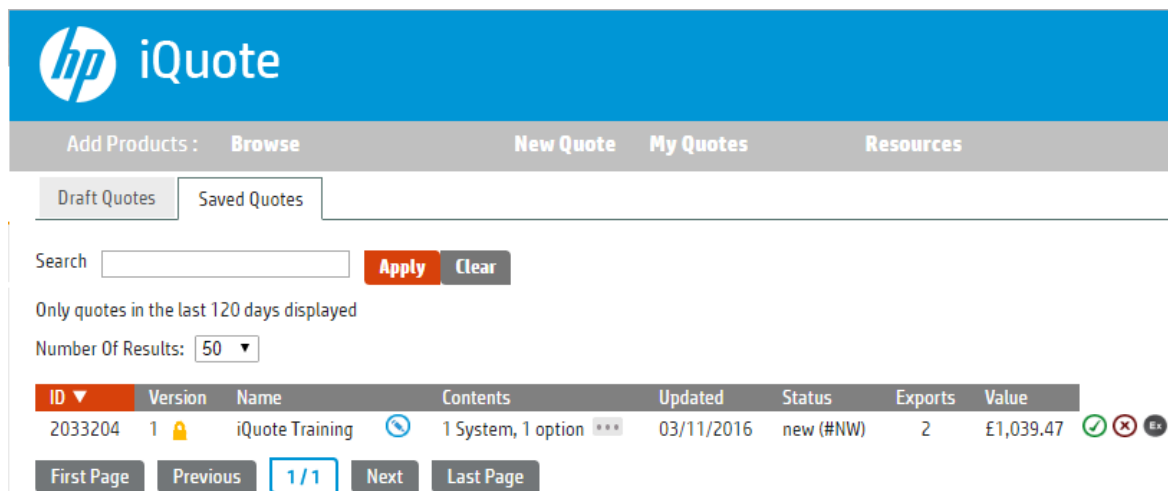
4.10.6   Padlock Symbol

If the quotation shows the following Padlock Symbol, it means the quote is currently locked for editing, for example; if you have already exported the quote. If you click on the padlock, it will create a new version of the quote as mentioned in **4.10.4**.

5.   How to Retrieve a Quote

When you first login to iQuote, or at any stage during the quotation process, you can click on **My Quotes** and you will be presented with a full list of all previously saved quotes as well as any draft quotes. Draft quotes include any quote that you start working on, but have 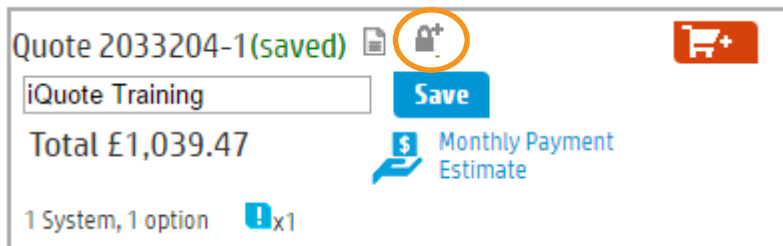never saved or exported. This feature ensures that you will never lose work from a session timeout or by prematurely closing your browser.

Select from 'Draft Quotes' or 'Saved Quotes' tab and you can either scroll down the screen or use the search box to type in a part of the quote name, such as a Company/Customer Name that you entered when saving the quote.

The icons on the right of the screen allow you to:

Mark a quote as won

Remove the quote

Export the quote

The other icons you see on the screen enable you to:

⊕ Show all versions of the quote

◉ Rename the quote

🔒 Locked for Editing

5.1 Draft Quotes

If you want to go back and complete a quotation, click on 'Draft Quotes' and find the quotation you are looking for. By clicking on the quote, the following screen will appear to allow you to check for prices and stock that may have changed since you first started the quote. You will have the option to view the quotation (so you can edit it) or copy it to start a new quote.

Quote 2033156 Version 1 ✕

ID: **2033156**   Version: **1**   Updated: **03/11/2016**   Value: **£11,693.60**

Mfr Part No	Variant	Description	List Price	Unit Price	Price Change	Quantity	Line Price	Stock
G1X71EA		HP Z840 RMT Intel Xeon E5-2687W v3 10-Core (3.10GHz 25MB) NVIDIA Quadro K6000 (12GB) Graphics 128GB (8 x 16GB) DDR4 2133MHz 1TB (7.2k rpm) + 512GB PCIe SSD DVD-RW MCR Windows 8.1 Pro (64-bit) (7 Pro License) 3yr Next Business Day Warranty	£11,836.00 *	£11,125.84	none	1	£11,125.84	45
P5K20EA		HP ProDesk 400 G2 DM Intel Core i5-6500T Quad-Core (2.50GHz 6MB) Intel HD 530 Graphics 8GB (1 x 8GB) DDR4-2133MHz 256GB 3D SSD Windows 10 Pro (64-bit) (7 Pro License) 1yr Next Business Day Warranty	£548.00 *	£515.12	none	1	£515.12	40
U6578E			£56.00 *	£52.64	none	1	£52.64	24

Edit   **Copy**

5.2 Saved Quotes

If you need to return to a saved quote to check details such as stock and price, you can do so by entering 'Saved Quotes' and clicking on the relevant quotation. You will then be presented with the following screen which will allow you to create a new version of the quote.

Quote 2033204 Version 1 ✕

ID: **2033204**   Version: **1**   Name: **iQuote Training**   Updated: **03/11/2016**   Status: **new (#NW)**   Exports: **2**   Value: **£1,039.47**

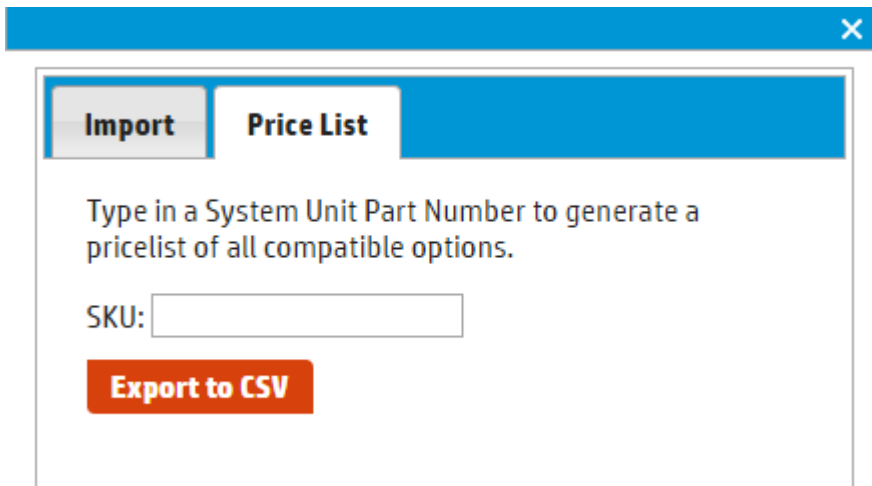| Mfr Part No	Variant	Description	List Price	Unit Price	Price Change	Quantity	Line Price	Stock
F6X30EA		HP EliteDesk 800 G1 DM Intel Core i7-4765T Quad-Core (2.00GHz 8MB) Intel HD 4600 Graphics 8GB (1 x 8GB) DDR3 1600MHz 256GB SSD Intel 7260 802.11abgn Windows 8.1 Pro (64-bit) (7 Pro License) 3yr Next Business Day Warranty	£1,027.70 *	£966.04	none	1	£985.75	1
U7899E		HP 5 year Next Business Day Onsite Hardware Support for Desktops	£56.00 *	£52.64	none	1	£53.71	23

View   **Copy**   **Create next version**
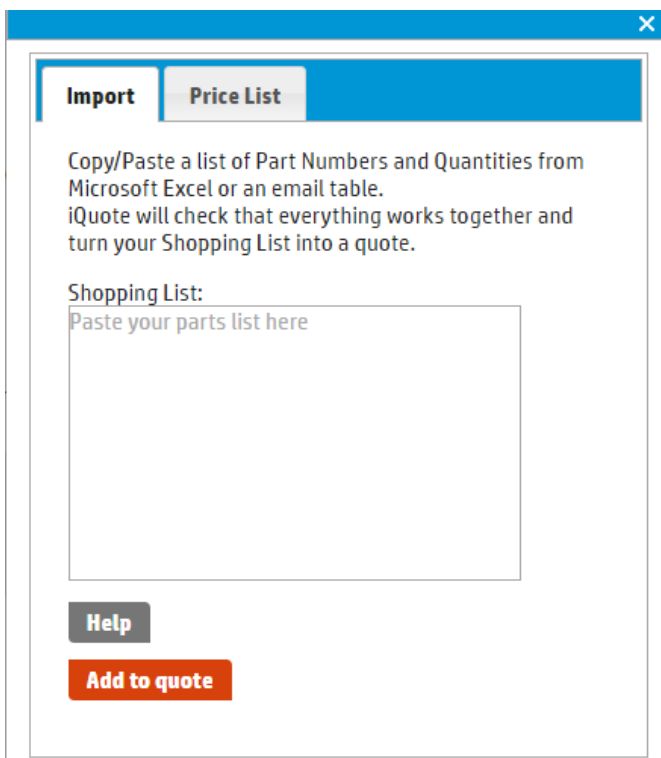
6.   Tools and Resources

6.1   Tools

To access tools, click on Tools at the top of the screen.

The Price List function allows you to type in a part number to generate a price list by system.


Alternatively Copy/Paste a list of Part Numbers and Quantities from Microsoft Excel or an email table. iQuote will check that everything works together and turn a Shopping List into a quote.

6.2   Resources

To access Training Materials, Deal Information and Promotional Resources click on the Resources button
Resources and you will be taken through to the following screen:
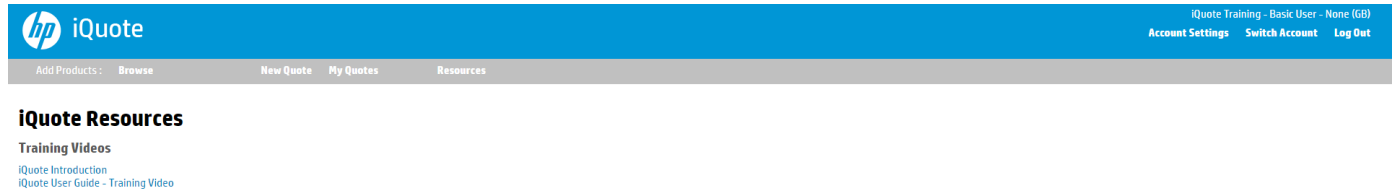
You can then browse the materials and click through to the Resource you are interested in.

7.   Submitting feedback and asking for Support

At any point on the iQuote screen, if you have any feedback or support issues you can do so by clicking on
Submit feedback to the bottom left of the screen, as shown:
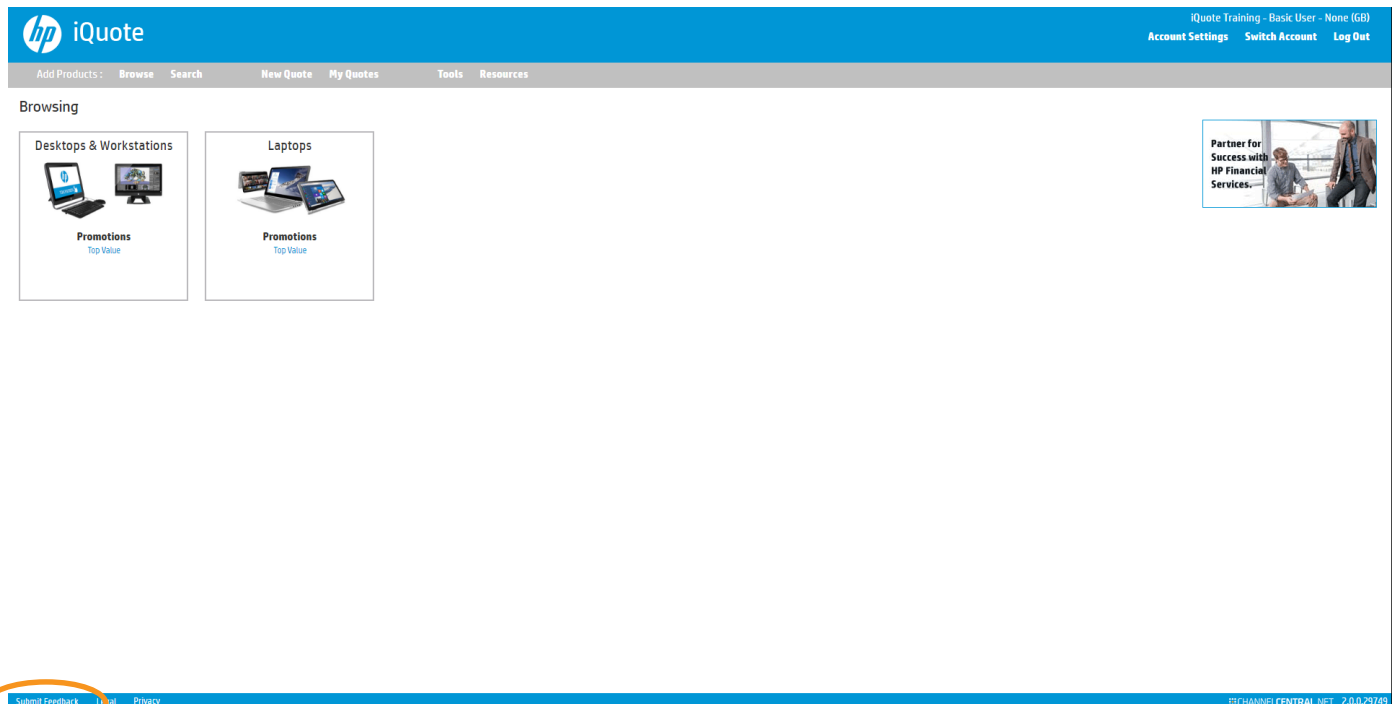
Once you have clicked here, you will see the following screen where you can select the feedback type and enter a description of the query. ***Please be as specific and detailed as possible in order for the iQuote Support Team to be able to assist you with the enquiry:***

8. Logging Out

When you have finished using the tool, it is important to Log Out, not only for securing quotes from others but to also ensure a complete information refresh when entering back into the tool. To Log out, click on 'Log Out' on the top right of the screen and you will then receive the below Pop-out for confirmation.

For security reasons this message will also appear after a period of inactivity. Select Continue to continue working in iQuote.
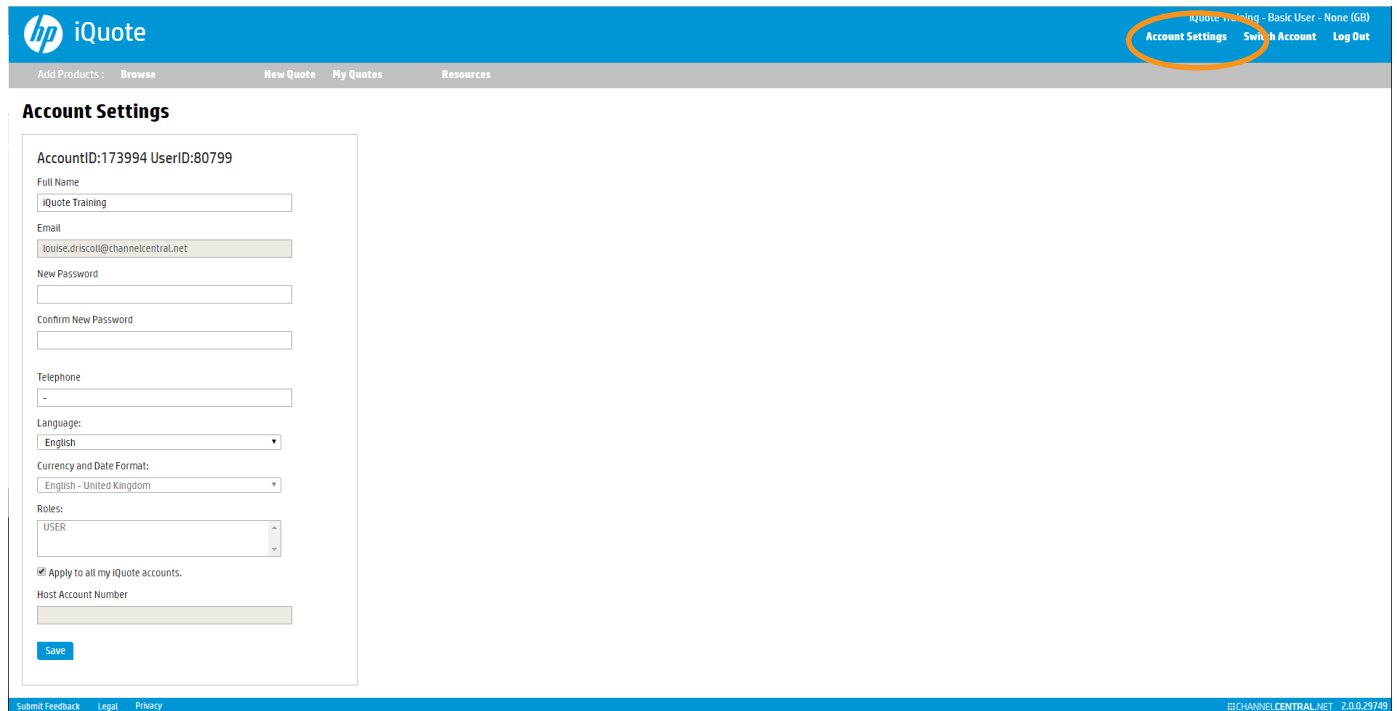
9. Account Settings

There are some settings available to you to make changes to your account. By clicking on 'Account Settings' in the top right of the screen the following page will appear which enables you to amend your name, password, telephone number, language, currency and date formats:

10. Training and Useful Information

If you would like to see iQuote in action, please see our training video under Resources on the iQuote main menu.

For any training or support queries please use the 'Submit Feedback' link in the iQuote tool or contact:

support@channelcentral.net

For enquiries relating to hosting iQuote contact:

sales@channelcentral.net