

iQuote User Guide

HPI 1.0

01 December 2016



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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

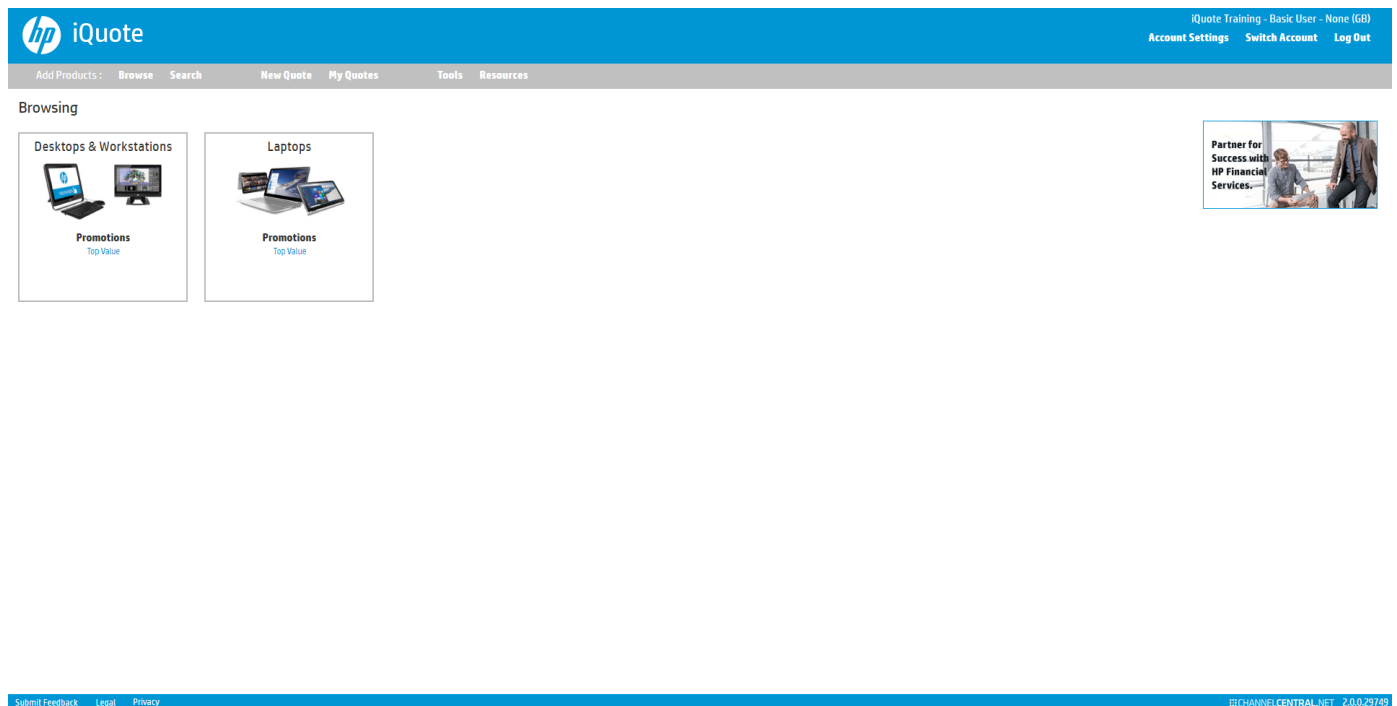
The iQuote Configure, Price, Quote tool helps Distributors and Resellers around the world to grow their HPI business by increasing revenue and margin through options attach, increasing quote accuracy and reducing quotation turnaround time.

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.

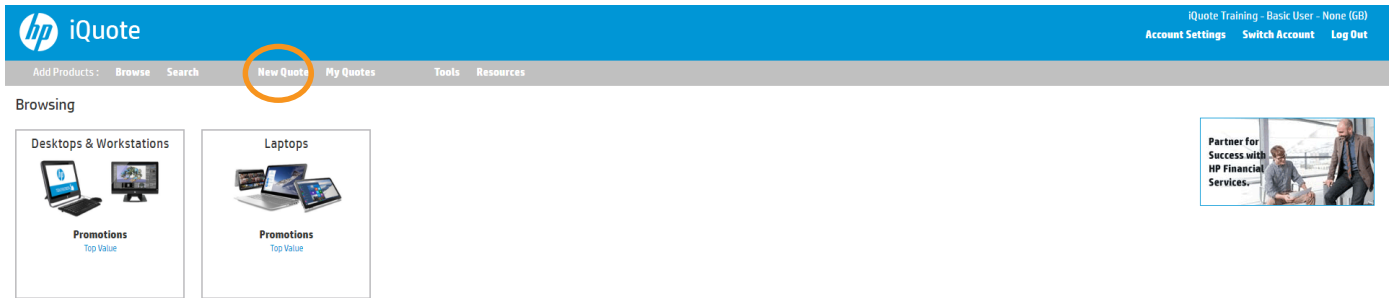


3. How to create a New Quote

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.

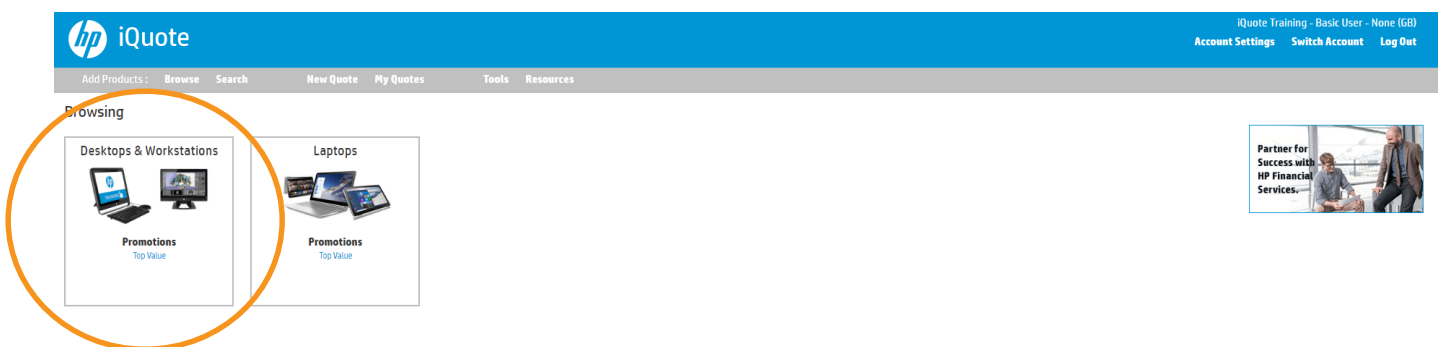


3.2 Selecting a Product Family

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:

The screenshot shows the iQuote website interface. At the top, there is a navigation bar with the HP logo and 'iQuote' text. Below this, there are links for 'Add Products', 'Browse', 'Search', 'New Quote', 'My Quotes', 'Tools', and 'Resources'. On the right side of the top bar, there are links for 'Account Settings', 'Switch Account', and 'Log Out'. The main content area is titled 'Partner for Success with HP Financial Services...' and 'Browsing All Products > Desktops & Workstations'. Below this, there is a filter section with 'SKU Type', 'Price', 'Form Factor', and 'Memory' categories. The main display is a grid of product family cards. The 'ProDesk 400 G2' card is circled in orange. Other cards include EliteDesk 800 G1, Slate 21 Pro All-in-One, t520 Flexible Thin Client, t620 Thin Client, Z1 G2 All-in-One, Z420, Z440, Z640, Z840, t420 Thin Client, EliteDesk 705 G2, EliteOne 800 G2 All-in-One, and ProDesk 600 G2. At the bottom of the page, there are links for 'Submit Feedback', 'Legal', and 'Privacy', and a footer with 'CHANNELCENTRAL.NET 2.0.0.29749'.

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.**

The screenshot shows the iQuote website interface for the 'Slate 21 Pro All-in-One' product family. The top navigation bar is the same as in the previous screenshot. The main content area is titled 'Partner for Success with HP Financial Services...' and 'Browsing All Products > Desktops & Workstations > Slate 21 Pro All-in-One'. Below this, there is a filter section with 'SKU Type', 'Price', 'Form Factor', and 'Memory' categories. The main display is a list of individual models. The 'OW16AA' model is circled in orange. Other models include 'GOW16AT'. At the bottom of the page, there are links for 'Submit Feedback', 'Legal', and 'Privacy', and a footer with 'CHANNELCENTRAL.NET 2.0.0.29749'.

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

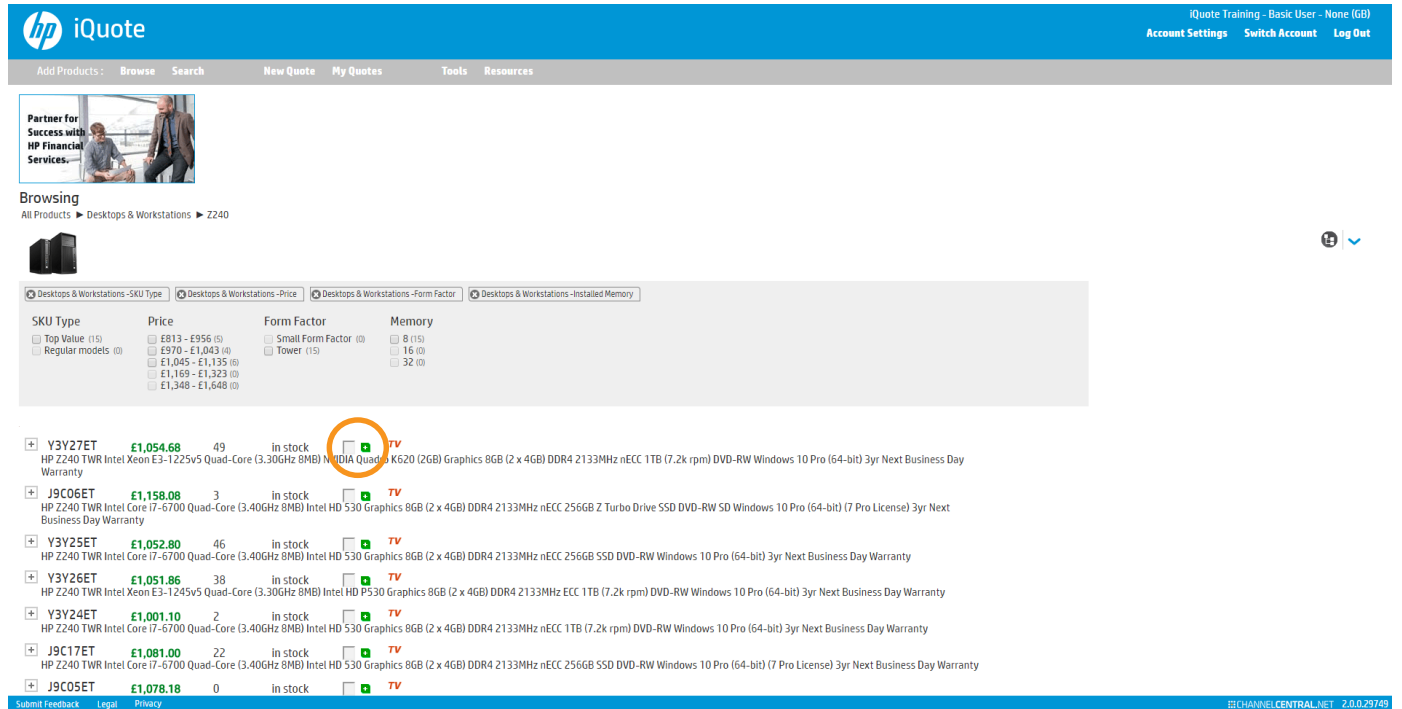
This view is guided selling and it can be selected from various points within iQuote.

The screenshot shows the HP iQuote interface. At the top, there's a navigation bar with 'hp iQuote' and user options like 'Account Settings', 'Switch Account', and 'Log Out'. Below the navigation, there's a 'Partner for Success with HP Financial Services' banner. The main section is titled 'Browsing' and shows 'All Products' with a sub-menu for 'Desktops & Workstations'. A filter panel is visible with categories: SKU Type (Top Value, Regular models), Price (E206-E418, E418-E533, E544-E748, E783-E1,169, E1,172-E11,126), Form Factor (Desktop Mini, All In One, Thin client, Tower, Small Form Factor, Ultra-Small Form Factor, Desktops), and Memory (0-4, 8, 16-128). Below the filters is a grid of product cards, each with an image, model name, price range, installed memory, and form factor. The cards include: EliteDesk 800 G1, ProDesk 400 G2, Slate 21 Pro All-in-One, t520 Flexible Thin Client, t620 Thin Client, Z1 G2 All-in-One, Z420, Z440, Z640, Z840, t420 Thin Client, EliteDesk 705 G2, EliteOne 800 G2 All-in-One, and ProDesk 600 G2.

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.

This screenshot shows the same HP iQuote interface as the previous one, but with the filter panel expanded. The filter categories are: SKU Type (Top Value, Regular models), Price (E206-E418, E418-E533, E544-E748, E783-E1,169, E1,172-E11,126), Form Factor (Desktop Mini, All In One, Thin client, Tower, Small Form Factor, Ultra-Small Form Factor, Desktops), and Memory (0-4, 8, 16-128). The 'Z440' product card is circled in orange. The card shows the model name 'Z440', a price range of '£1,216.36 to £2,229.00', installed memory of '8GB to 16GB', and form factor of 'Mixed'. The text '15 of 58 match' is visible above the card.

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.



The screenshot shows the HP iQuote interface. At the top, there's a navigation bar with 'iQuote' logo and user options like 'Account Settings', 'Switch Account', and 'Log Out'. Below that, there are tabs for 'Add Products', 'Browse', 'Search', 'New Quote', 'My Quotes', 'Tools', and 'Resources'. A 'Partner for Success with HP Financial Services' banner is visible. The main content area is titled 'Browsing' and shows 'All Products > Desktops & Workstations > Z240'. There are several filter tabs: 'Desktops & Workstations -SKU Type', 'Desktops & Workstations -Price', 'Desktops & Workstations -Form Factor', and 'Desktops & Workstations -Installed Memory'. A table of filters is shown with categories like 'SKU Type', 'Price', 'Form Factor', and 'Memory'. Below the filters, a list of product SKUs is displayed, each with a green plus button, price, stock status, and a 'TV' icon. One of the SKUs, 'Y3V27ET', has its plus button circled in orange. The footer contains 'Submit Feedback', 'Legal', 'Privacy', and '© CHANNELCENTRAL.NET 2.0.0.29749'.

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:



The screenshot shows a search bar titled 'Systems Search' with a search input field. The search bar is highlighted with an orange oval. The search bar is located at the top of the page, below the navigation bar. The search input field is empty and has a placeholder text 'Search:'. The search bar is located at the top of the page, below the navigation bar.

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:

▶ 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	<input type="text" value=""/>	<input type="button" value="+"/>
▶ 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	<input type="text" value=""/>	<input type="button" value="+"/>
▶ Desktops & Workstations ▶ EliteDesk 705 G2 ▶ P6S27AW	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	£456.84	31in stock	<input type="text" value=""/>	<input type="button" value="+"/>
▶ Desktops & Workstations ▶ EliteDesk 705 G2 ▶ P6S28AW	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	£524.52	5in stock	<input type="text" value=""/>	<input type="button" value="+"/>
▶ Desktops & Workstations ▶ EliteDesk 705 G2 ▶ M9B23EA	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	£532.98	17in stock	<input type="text" value=""/>	<input type="button" value="+"/>
▶ Desktops & Workstations ▶ EliteDesk 705 G2 ▶ P6S29AW	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	£456.84	43in stock	<input type="text" value=""/>	<input type="button" value="+"/>
▶ Desktops & Workstations ▶ EliteDesk 705 G2 ▶ P6S30AW	HP EliteDesk 705 G2 SFF AMD A10-Series A10-8750B Dual-Core (3.20GHz 4MB) AMD Radeon R7 Graphics 8GB (2 x 4GB) DDR3 1600MHz (LV) 500GB (7.2k rpm) DVD	£523.58	41in stock	<input type="text" value=""/>	<input type="button" value="+"/>
▶ Desktops & Workstations ▶ EliteDesk 705 G2 ▶ M9B24EA	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	£575.28	27in stock	<input type="text" value=""/>	<input type="button" value="+"/>
▶ Desktops & Workstations ▶ EliteDesk 705 G2 ▶ M9B18EA	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-	£518.88	0in stock	<input type="text" value=""/>	<input type="button" value="+"/>
▶ Desktops & Workstations ▶ EliteDesk 705 G2 ▶ M9B20EA	HP EliteDesk 705 G2 MT 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) DVD	£541.44	0in stock	<input type="text" value=""/>	<input type="button" value="+"/>
▶ Desktops & Workstations ▶ EliteDesk 705 G2 ▶ P6S26AW	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-	£502.90	26in stock	<input type="text" value=""/>	<input type="button" value="+"/>
▶ Desktops & Workstations ▶ EliteDesk 705 G2 ▶ M9B22EA	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-#	£586.56	46in stock	<input type="text" value=""/>	<input type="button" value="+"/>
▶ Desktops & Workstations ▶ EliteDesk 705 G2 ▶ P6S26AW	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-	£501.96	0in stock	<input type="text" value=""/>	<input type="button" value="+"/>
▶ 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	<input type="text" value=""/>	<input type="button" value="+"/>
▶ Desktops & Workstations ▶ EliteDesk 705 G2 ▶ T4J37EA	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	£484.10	19in stock	<input type="text" value=""/>	<input type="button" value="+"/>
▶ Desktops & Workstations ▶ EliteDesk 705 G2 ▶ T4J35EA	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	£509.48	0in stock	<input type="text" value=""/>	<input type="button" value="+"/>
▶ Desktops & Workstations ▶ EliteDesk 705 G2 ▶ P6S26AW	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	<input type="text" value=""/>	<input type="button" value="+"/>
▶ 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	<input type="text" value=""/>	<input type="button" value="+"/>
▶ 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	<input type="text" value=""/>	<input type="button" value="+"/>
▶ 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	<input type="text" value=""/>	<input type="button" value="+"/>
▶ 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	<input type="text" value=""/>	<input type="button" value="+"/>
▶ 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	<input type="text" value=""/>	<input type="button" value="+"/>

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

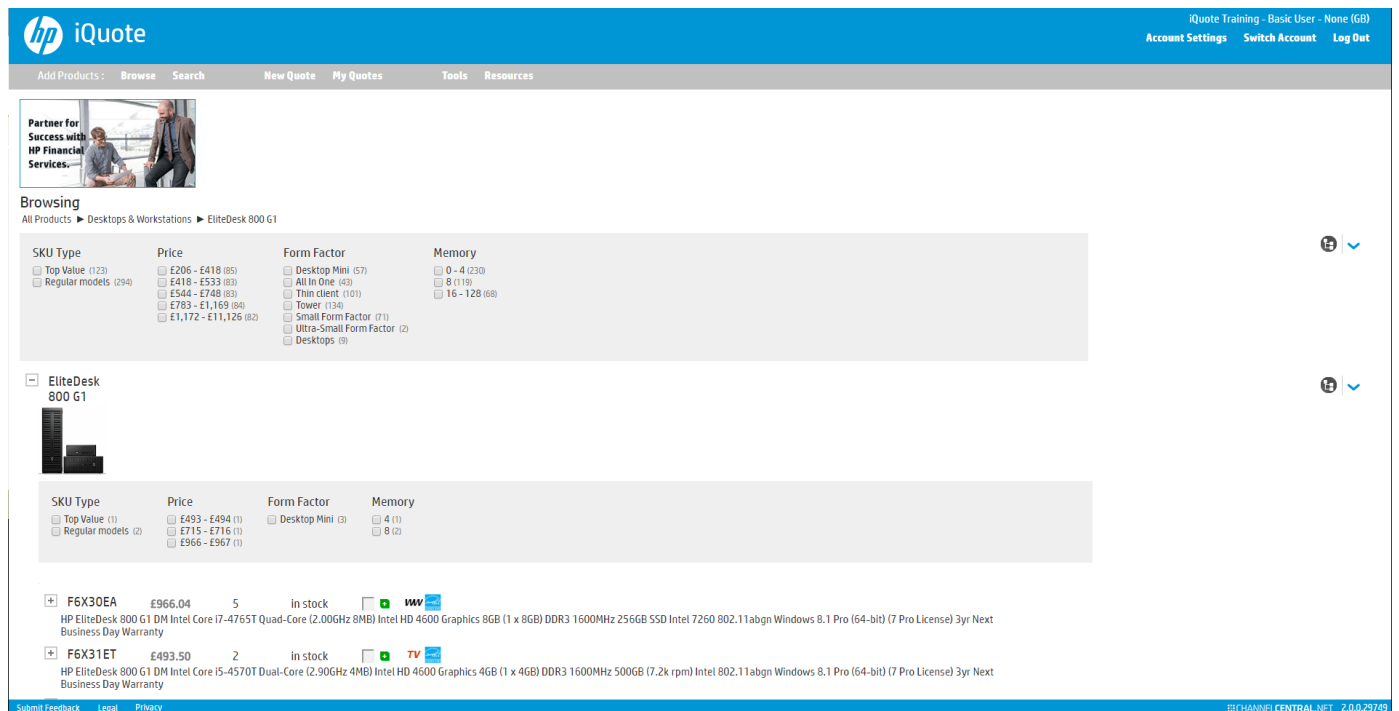
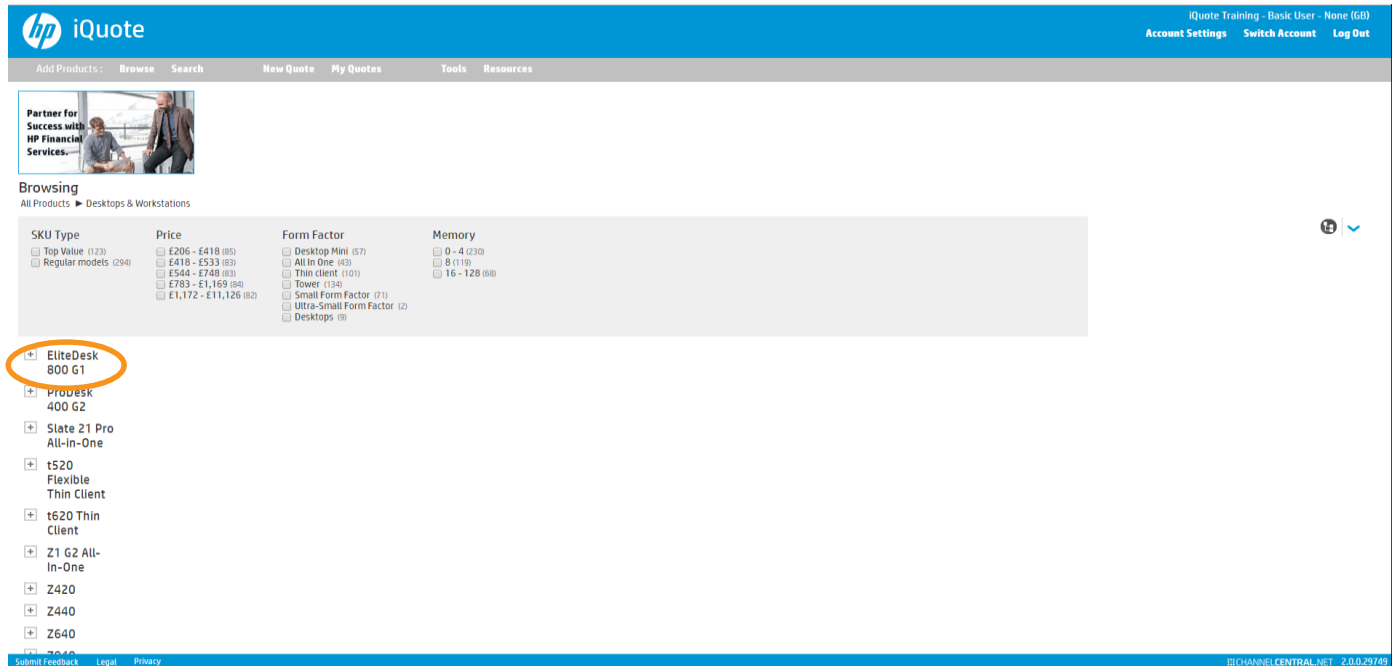
There are a number of different Screen View options for you to use while creating a quotation. You have the option to change the way you view the products within iQuote at certain points in the configuration. To change the way you view the products, click on the icon shown below:

The screenshot shows the iQuote web application interface. At the top, there's a navigation bar with 'hp iQuote' and user options like 'Account Settings', 'Switch Account', and 'Log Out'. Below this is a 'Browsing' section for 'Desktops & Workstations'. It features a filter sidebar with categories like 'SKU Type', 'Price', 'Form Factor', and 'Memory'. The main area displays a grid of product cards, each with a product image, name, price range, and key specifications. A circled icon in the top right corner of the product grid indicates the screen view options.

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.

The screenshot shows the HP iQuote interface. At the top, there's a navigation bar with 'hp iQuote' and user options like 'Account Settings', 'Switch Account', and 'Log Out'. Below this is a 'Partner for Success with HP Financial Services' banner. The main content area is titled 'Browsing' and shows 'All Products' with a sub-menu for 'Desktops & Workstations'. A filter panel on the left allows filtering by 'SKU Type', 'Price', 'Form Factor', and 'Memory'. The main product grid has columns for various attributes, each with a collapse icon. A 'Price' dropdown menu is highlighted with an orange circle, and a 'Sort' icon is also highlighted. The product list includes items like G1X71EA, Y3Y45ET, T4K32EA, T4K32ET, and T4K64EA, each with detailed specifications and pricing.

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:

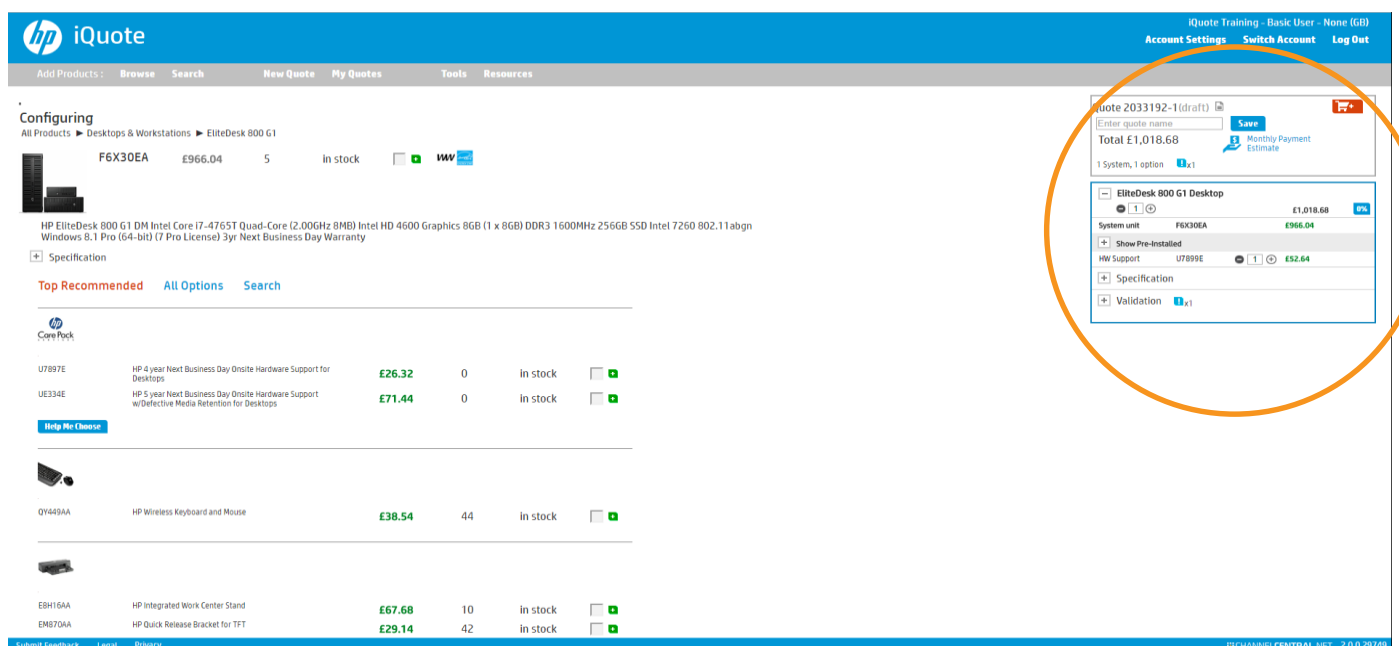


You can then make a selection and click through to start the configuration.

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  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:



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 0%

2 systems, 1 option ! x2 ? x1

Monthly Payment Estimate

- EliteDesk 800 G1 Desktop 0%

£1,018.68

System unit	F6X30EA	£966.04	
--------------------	---------	---------	--

+ Show Pre-Installed

HW Support	U7899E	£52.64	- 1 +
------------	--------	--------	-------

+ Specification

+ Validation ! x1 ? x1

- MT42 Mobile Thin Client Notebook 0%

£885.48

System unit	Y5X56EA	£885.48	
--------------------	---------	---------	--

+ Show Pre-Installed

+ Specification

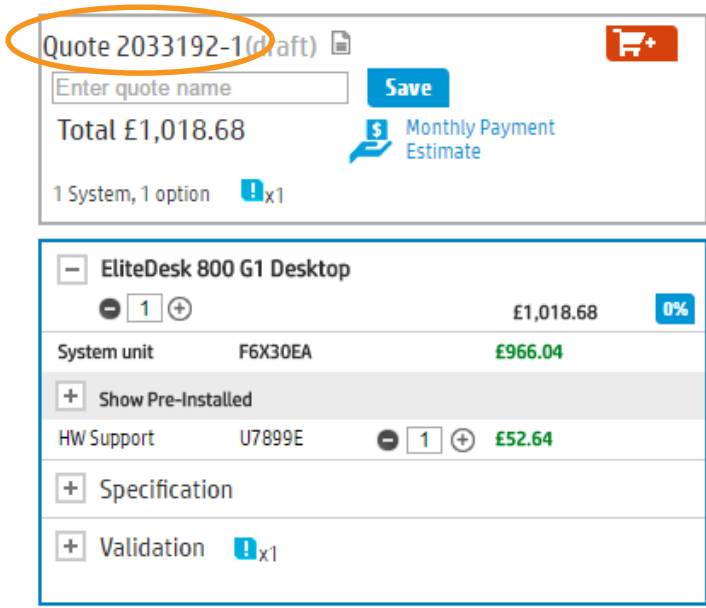
+ Validation ! x1 ? x1

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.

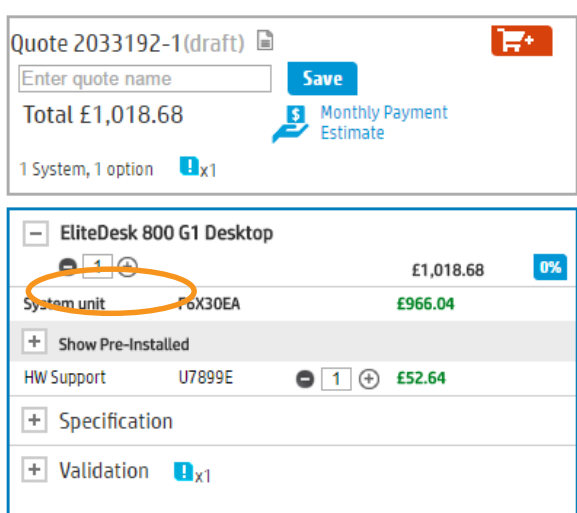


The screenshot shows a quote summary for 'Quote 2033192-1(draft)'. The total price is £1,018.68. Below the summary, a detailed configuration for 'EliteDesk 800 G1 Desktop' is shown. The system unit 'F6X30EA' is priced at £966.04. A 'HW Support' option 'U7899E' is added with a quantity of 1, priced at £52.64. The configuration also includes 'Specification' and 'Validation' options.

Quote 2033192-1(draft)		Total	Discount
Enter quote name		£1,018.68	0%
1 System, 1 option			
EliteDesk 800 G1 Desktop		£1,018.68	0%
System unit	F6X30EA	£966.04	
+ Show Pre-Installed			
HW Support	U7899E	£52.64	
+ Specification			
+ Validation			

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 \oplus 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 \ominus button when the quantity is 1 will remove the system square from the quote altogether.

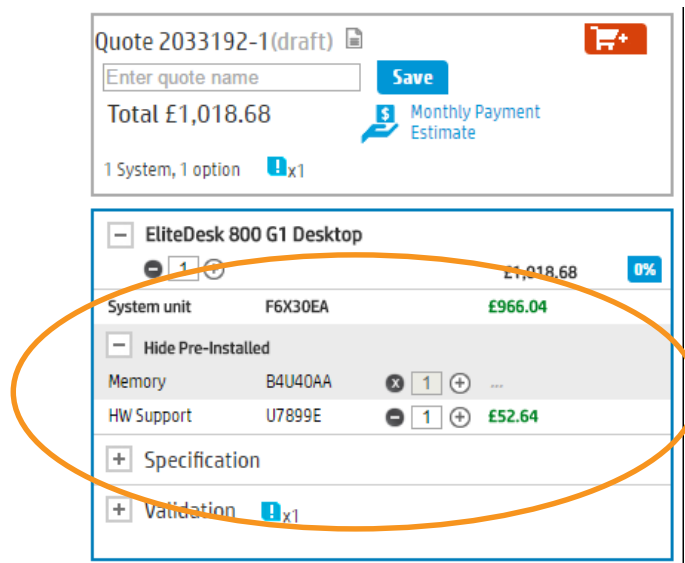


This screenshot is identical to the previous one, but with a red circle highlighting the quantity '1' and the minus/plus buttons for the 'EliteDesk 800 G1 Desktop' system unit.

4.3 Pre-Installed and Auto-Add Options

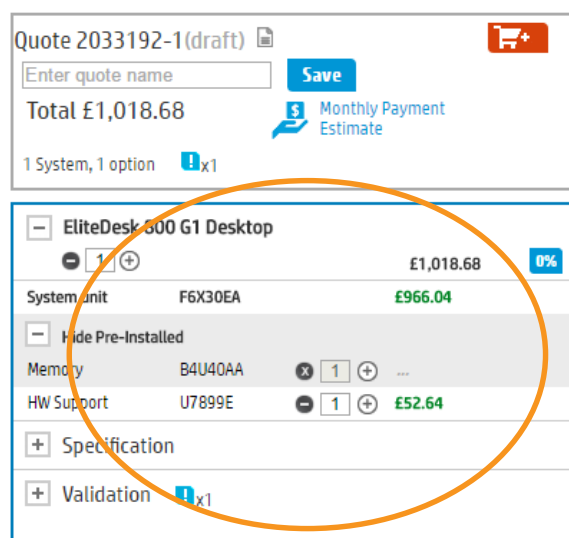
In each system square in the quote, a Pre-Installed section is present that can be expanded to show some of the most relevant options that are pre-installed into the system unit SKU from the factory. These can be viewed by expanding the grey 'Show Pre-Installed' section of the quote as shown.

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

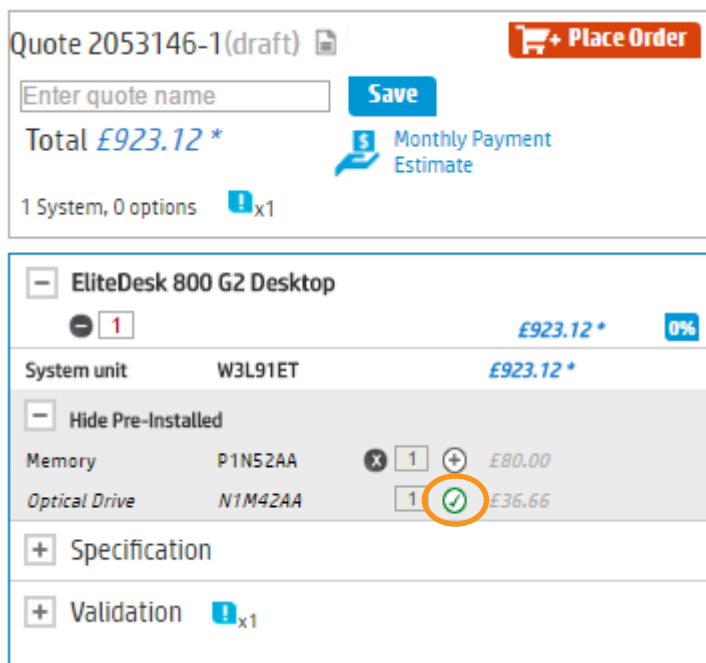
Within the selected system of the current quote, you will see the Pre-Installed system components as mentioned in 4.3 and as well as “attached” options which include any Auto-Add options, plus options added using any of the methods described below. From either type of option, you can click  to add one 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.



The screenshot displays the iQuote interface for a quote titled "Quote 2053146-1(draft)". At the top right, there is a "Place Order" button. Below the quote title, there is a "Save" button and a "Monthly Payment Estimate" link. The total price is shown as £923.12*. The quote contains 1 System and 0 options.

The main section shows the system components:

- EliteDesk 800 G2 Desktop**: Price £923.12*, 0% discount. Quantity 1.
- System unit**: W3L91ET, Price £923.12*
- Hide Pre-Installed** section:
 - Memory**: P1N52AA, Price £80.00, Quantity 1. Includes a minus icon and a plus icon.
 - Optical Drive**: N1M42AA, Price £36.66, Quantity 1. Includes a plus icon with a checkmark inside a circle.
- Specification**: Expandable section.
- Validation**: 1 validation note.

4.4.2 All Options

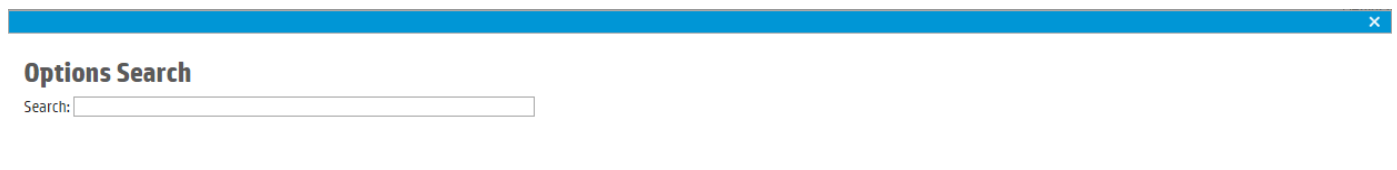
To browse the full catalogue of options compatible with the currently selected system click on [All Options](#) and from here you will be presented with a number of categories that you can tab through to make a selection.

[Top Recommended](#) [All Options](#) [Search](#)



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:



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.

Top Recommended All Options Search



U7897E	HP 4 year Next Business Day Onsite Hardware Support for Desktops	£26.32	0	in stock	<input type="checkbox"/> +
UE334E	HP 5 year Next Business Day Onsite Hardware Support w/Defective Media Retention for Desktops	£71.44	0	in stock	<input type="checkbox"/> +

Help Me Choose



QY449AA	HP Wireless Keyboard and Mouse	£38.54	44	in stock	<input type="checkbox"/> +
---------	--------------------------------	--------	----	----------	----------------------------

4.4.4.1 Help me Choose Filter

Top Recommended All Options Search

System Storage Accessories Expansion Rack & Power Services Software Miscellaneous

HW Support

Duration

1 yr (1) 2 yr (1) 3 yr (9) 4 yr (3) 5 yr (5)

Response

Onsite, 9x5, NBD (8) Onsite, 9x5, 3BD CTR (2) Onsite, 9x5, NBD CTR (3) Onsite, 24x7, 24hr CTR (3)

Service Delivery

Other (3) HW Support (16)

Enhanced Features

Travel Coverage (1) DMR (1) ADP (2) Security Tracing (1)

Price Add a sort

Part Number	Promotions	Description	Travel Coverage	DMR	ADP	Security Tracing	Length Of Coverage	Response	Stock	Price
U7897E		HP 4 year Next Business Day Onsite Hardware Support for Desktops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4 yr	Onsite, 9x5, NBD	0	£26.32
U7899E		HP 5 year Next Business Day Onsite Hardware Support for Desktops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5 yr	Onsite, 9x5, NBD	42	£52.64
UE333E		HP 4 year Next Business Day Onsite Hardware Support w/Defective Media Retention for Desktops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4 yr	Onsite, 9x5, NBD	11	£41.36
UE332E		HP 3 year Next Business Day Onsite Hardware Support w/Defective Media Retention for Desktops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3 yr	Onsite, 9x5, NBD	46	£22.56

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.

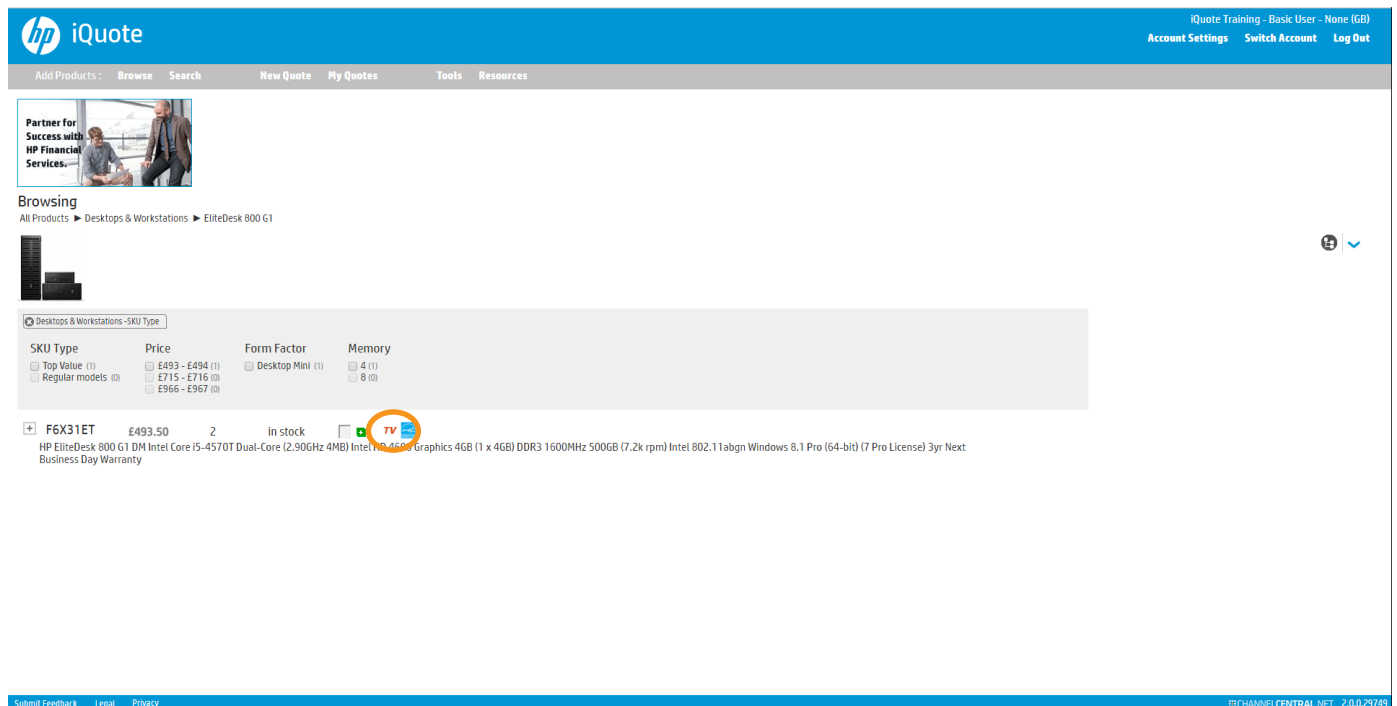
4.5.1 Banners

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.



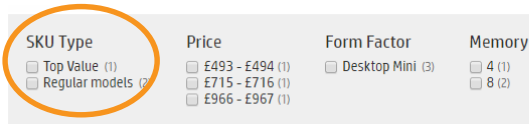
4.5.2 System Selection

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**.



The screenshot shows the HP iQuote interface. At the top, there is a navigation bar with the HP logo and 'iQuote' text. On the right side of the navigation bar, there are links for 'Account Settings', 'Switch Account', and 'Log Out'. Below the navigation bar, there is a breadcrumb trail: 'All Products > Desktops & Workstations > EliteDesk 800 G1'. A table of product options is displayed, with columns for 'SKU Type', 'Price', 'Form Factor', and 'Memory'. The 'SKU Type' column includes options like 'Top Value (1)', 'Regular models (0)', and 'EliteDesk 800 G1'. The 'Form Factor' column includes 'Desktop Mini (1)'. The 'Memory' column includes '4 (1)' and '8 (0)'. A 'TV' icon is highlighted in a red circle next to the 'EliteDesk 800 G1' product entry. Below the table, the product details for 'F6X31ET' are shown, including the price (£493.50), quantity (2), and stock status (in stock). The product description includes 'HP EliteDesk 800 G1 DM Intel Core i5-4570T Dual-Core (2.90GHz 4MB) Intel HD Graphics 4600 Graphics 4GB (1 x 4GB) DDR3 1600MHz 500GB (7.2k rpm) Intel 802.11abgn Windows 8.1 Pro (64-bit) (7 Pro License) 3yr Next Business Day Warranty'.

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.

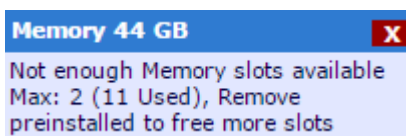
When you are in the current quote, you may notice the following symbols which acts as prompts for you to correct the configuration:

 x1 Critical Errors



 x1 Information or Upsell Recommendations

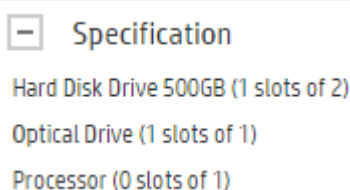
 x1 Warnings

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






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  :





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  and then entering the margin into the box provided as shown here:




Quote 2033204-1(draft)  

Enter quote name **Save**

Total £1,018.68  Monthly Payment Estimate



1 System, 1 option  x1

EliteDesk 800 G1 Desktop


  £1,018.68 

System unit F6X30EA **£966.04**



+ Show Pre-Installed

HW Support U7899E   **£52.64**


+ Specification


+ Validation  x1

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




Quote 2033204-1(draft)  


Enter quote name **Save**

Total £1,039.47  Monthly Payment Estimate




1 System, 1 option  x1

EliteDesk 800 G1 Desktop


  Base price £1,018.68 **£1,039.47** 

System unit F6X30EA **£985.75** 


+ Show Pre-Installed

HW Support U7899E   **£53.71** 


+ Specification


+ Validation  x1

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:



Quote 2033204-1(draft) 

Enter quote name **Save**


Total £1,039.47  Monthly Payment Estimate



1 System, 1 option  x1


EliteDesk 800 G1 Desktop



  Base price £1,018.68 £1,039.47 2%

System unit F6X30EA £985.75 2%


 Show Pre-Installed


HW Support U7899E   £53.71 **Apply**

 Specification

 Validation  x1

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:



HP Financial Services
×

Monthly Payment Estimate

Your inputs

Classification	Quote Value	Additional Amounts
Hardware	£715.34	£ <input type="text" value="0"/>
Printers	£0.00	£ <input type="text" value="0"/>
Software & Services	£52.64	£ <input type="text" value="0"/>
Total to Finance	£ 767.98	

Lease Term

Lease Type 

Results

Selected Financing Terms	Monthly Payment
36 months, Fair Market Value	£22.74

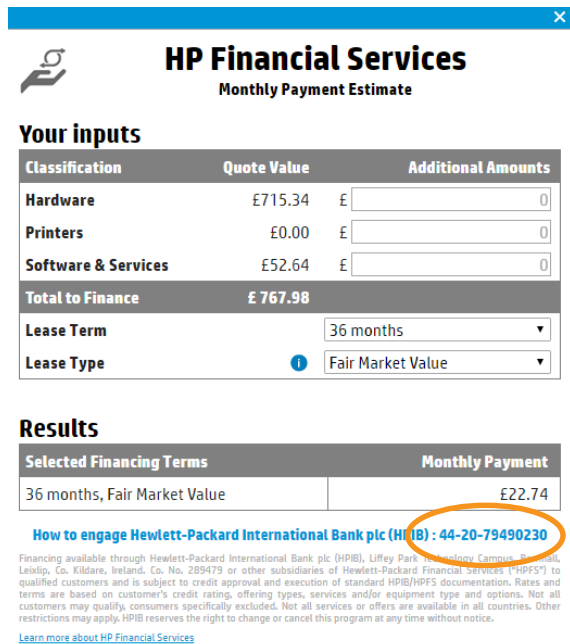
How to engage Hewlett-Packard International Bank plc (HPIB) : 44-20-79490230

Financing available through Hewlett-Packard International Bank plc (HPIB), Liffey Park Technology Campus, Barnhall, Leixlip, Co. Kildare, Ireland, Co. No. 289479 or other subsidiaries of Hewlett-Packard Financial Services ("HPFS") to qualified customers and is subject to credit approval and execution of standard HPIB/HPFS documentation. Rates and terms are based on customer's credit rating, offering types, services and/or equipment type and options. Not all customers may qualify, consumers specifically excluded. Not all services or offers are available in all countries. Other restrictions may apply. HPIB reserves the right to change or cancel this program at any time without notice.

[Learn more about HP Financial Services](#)

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:



HP Financial Services
Monthly Payment Estimate

Your inputs

Classification	Quote Value	Additional Amounts
Hardware	£715.34	£ 0
Printers	£0.00	£ 0
Software & Services	£52.64	£ 0
Total to Finance	£ 767.98	

Lease Term: 36 months
Lease Type: Fair Market Value

Results

Selected Financing Terms	Monthly Payment
36 months, Fair Market Value	£22.74

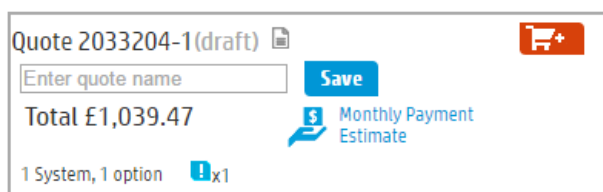
How to engage Hewlett-Packard International Bank plc (HPIB) : 44-20-79490230

Financing available through Hewlett-Packard International Bank plc (HPIB), Liffey Park, Leixlip, Co. Kildare, Ireland, Co. No. 289479 or other subsidiaries of Hewlett-Packard Financial Services ("HPFS") to qualified customers and is subject to credit approval and execution of standard HPIB/HPFS documentation. Rates and terms are based on customer's credit rating, offering types, services and/or equipment type and options. Not all customers may qualify, consumers specifically excluded. Not all services or offers are available in all countries. Other restrictions may apply. HPIB reserves the right to change or cancel this program at any time without notice.

[Learn more about HP Financial Services](#)

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.



Quote 2033204-1(draft)

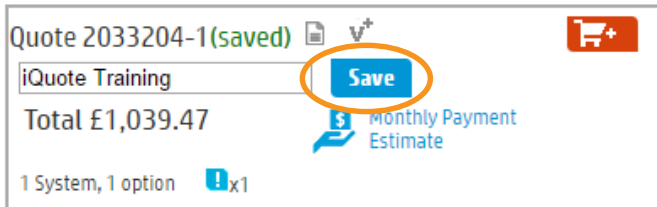
Enter quote name Save

Total £1,039.47 Monthly Payment Estimate


1 System, 1 option x1

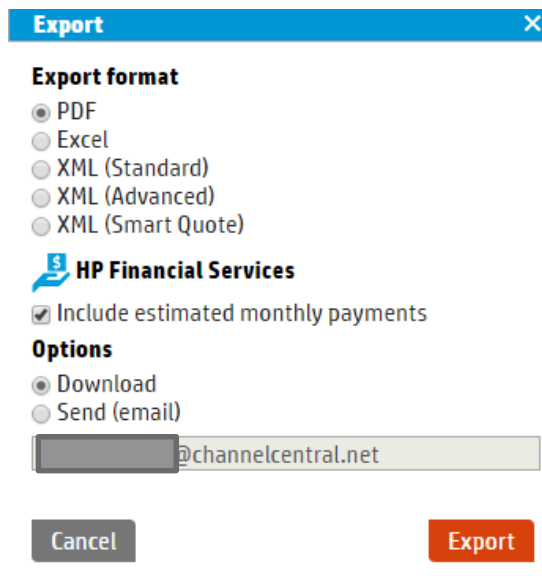
4.10.1 Save

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:




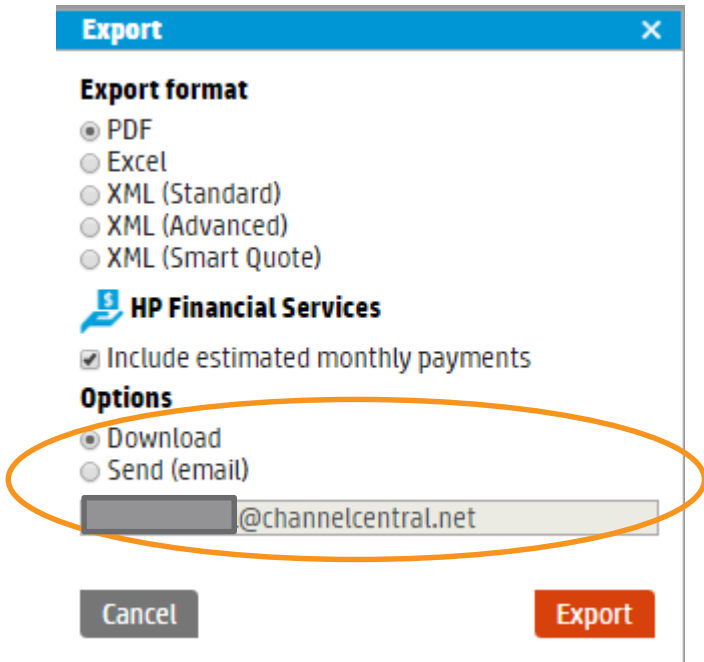
4.10.2 Export

The Export function  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'.



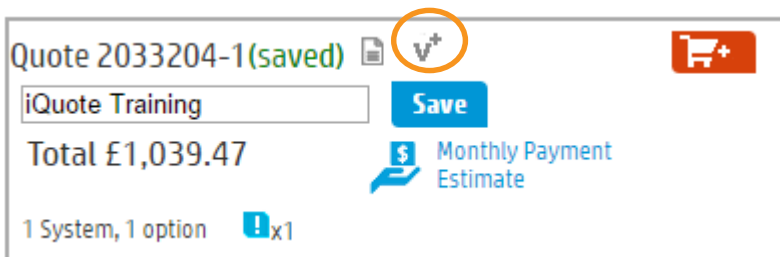
4.10.4 Add to Basket

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.

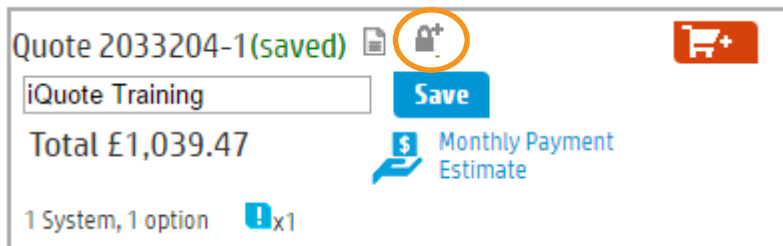
4.10.5 V+ Symbol

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:



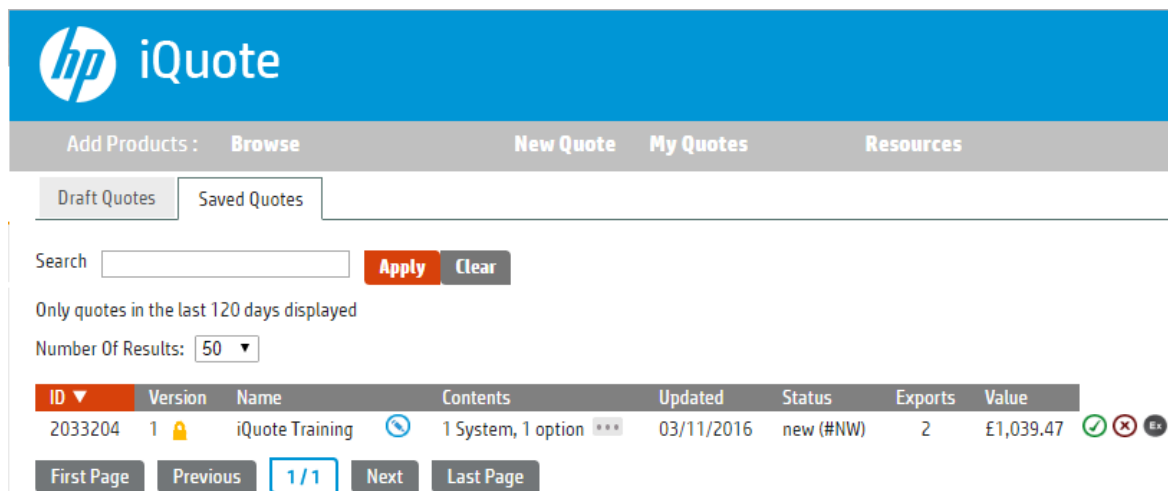
4.10.6 Padlock Symbol

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.



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


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	

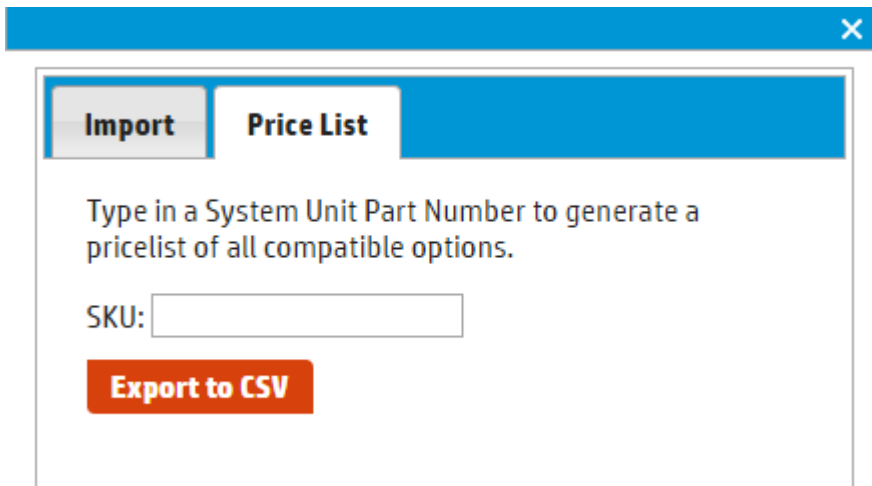
[View](#) [Copy](#) [Create next version](#)

6. Tools and Resources

6.1 Tools

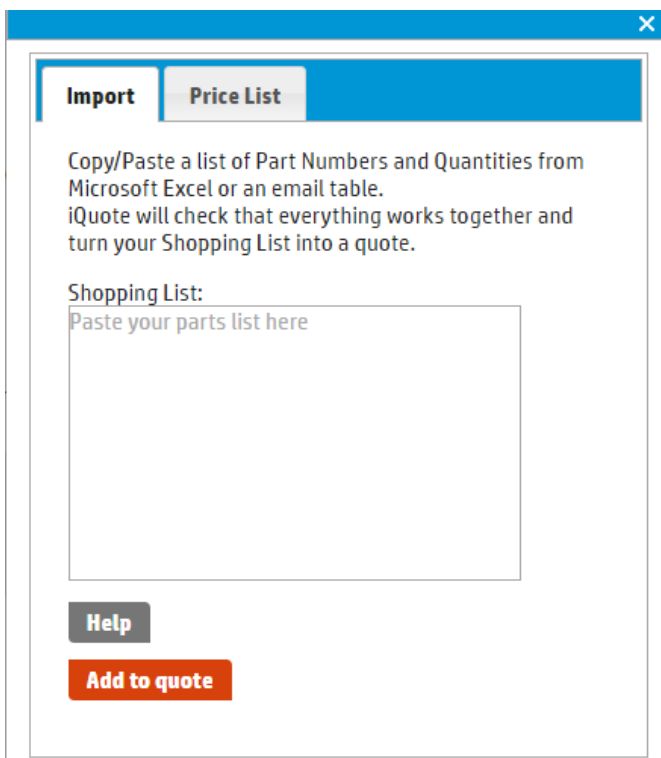
To access tools, click on **Tools** at the top of the screen.

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



The screenshot shows a web application window with a blue header bar containing a close button (X). Below the header is a navigation bar with two tabs: "Import" and "Price List". The "Price List" tab is active. The main content area contains the following text: "Type in a System Unit Part Number to generate a pricelist of all compatible options." Below this text is a text input field labeled "SKU:". At the bottom of the form is a red button labeled "Export to CSV".

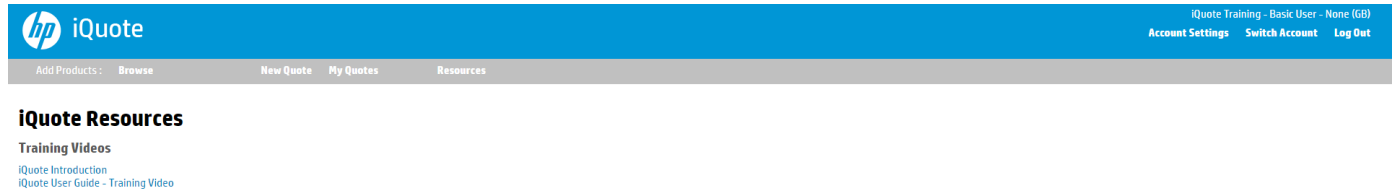
Alternatively Copy/Paste a list of Part Numbers and Quantities from Microsoft Excel or an email table. iQuote will check that everything works together and turn a Shopping List into a quote.



The screenshot shows the same web application window as above, but with the "Import" tab active. The main content area contains the following text: "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 your Shopping List into a quote." Below this text is a text input field labeled "Shopping List:" with the placeholder text "Paste your parts list here". At the bottom of the form are two buttons: a grey "Help" button and a red "Add to quote" button.

6.2 Resources

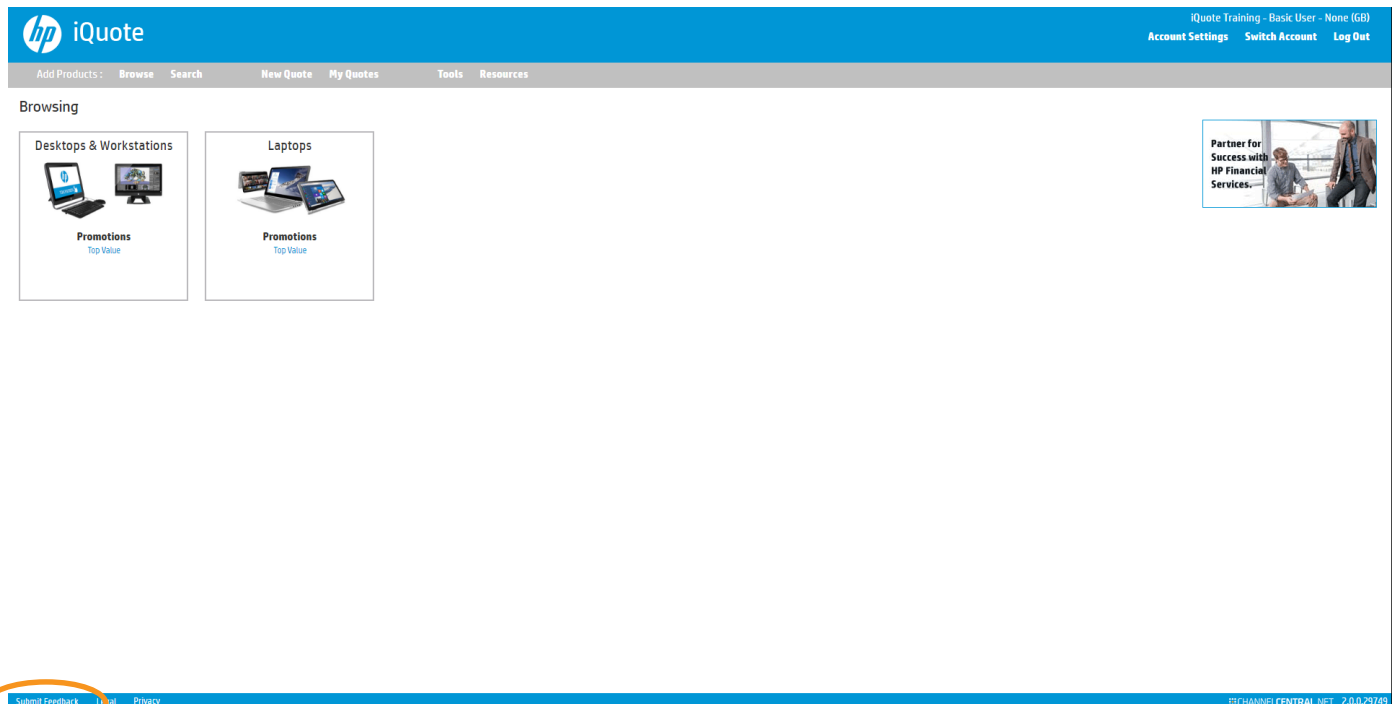
To access Training Materials, Deal Information and Promotional Resources click on the Resources button **Resources** and you will be taken through to the following screen:



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:**

Feedback
✕

Your email

Your name

Preferred language

Feedback type

Your feedback

Allow support staff to see my iQuote session

Feedback

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.

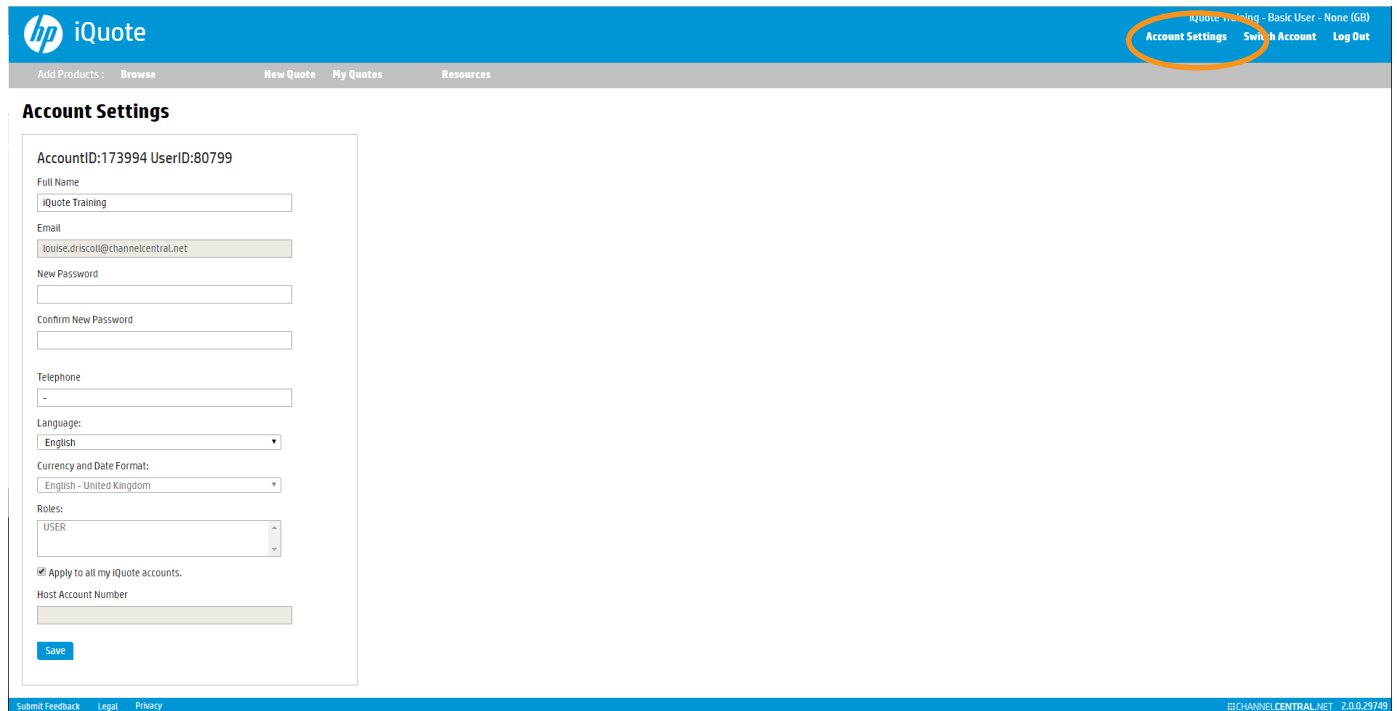
You will be logged out soon due to inactivity. Do you wish to continue using iQuote?

Continue

>Log out

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:



The screenshot shows the 'Account Settings' page in the iQuote application. The page header includes the iQuote logo and navigation links: 'Add Products', 'Browse', 'New Quote', 'My Quotes', and 'Resources'. In the top right corner, there are links for 'Account Settings', 'Switch Account', and 'Log Out'. The main content area is titled 'Account Settings' and contains a form with the following fields:

- AccountID:173994 UserID:80799
- Full Name: iQuote Training
- Email: louise.driscoll@channelcentral.net
- New Password: [Empty field]
- Confirm New Password: [Empty field]
- Telephone: -
- Language: English
- Currency and Date Format: English - United Kingdom
- Roles: USER
- Apply to all my iQuote accounts.
- Host Account Number: [Empty field]
- Save button

The footer of the page includes 'Submit Feedback', 'Legal', 'Privacy', and the version information 'EGCHANNELCENTRAL.NET 2.0.0.29749'.

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