CTO Tool Tutorial

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Simplifying Quoting for Intel Data Center Blocks

**MANUAL**
Replacing HPC configuration spreadsheet and email process

**AUTOMATED**
Launching online quoting tool for CTO Data Center Blocks (DCB)

- The tool globally available on April 2017.
- Logic built-in to guarantee valid configurations on first submission
- Once quote accepted, product code automatically generated in minutes
CTO Tool vs. Server Configurator Tool

When to use what?

SERVER CONFIGURATOR TOOL
- Used to configure a server system from list Intel compatible products (THOL)
- Produces a BOM that can be sent to a Disti for order
- Reseller submit generated BOM to Disti directly

CTO TOOL
- Used to receive a quote for CTO Intel® Data Center Blocks
- Systems are configured from specific configuration options (reduced THOL)
- Automation of quoting process with selected Disti
CTO Quote Request Process Overview

Log in to the tool with ITP SSO

Enter quote details, build configurations, select Disti

Submit config

Disti sets reseller price and sends quote to reseller via email

Disti receives config via email and accesses pricing from tool

Intel pricing team loads Disti price into CTO tool

Disti accepts or rejects Intel quote in the CTO Tool on reseller's behalf

If accepted, tool generates MM/PC

Disti places order in WOM
How to access the CTO Tool

• Access to the tool requires ITP login with NDA credentials

• Access locations:
  o Via direct link – [https://orderconfigurator.intel.com](https://orderconfigurator.intel.com)
  o Intel.com DCB Product Pages – [intel.com/dcb](http://intel.com/dcb)

• Access login can be requested from your Intel Representative or via email – [CTO_Tool_Help@Intel.com](mailto:CTO_Tool_Help@Intel.com)
Quote Dashboard

The Dashboard is the first screen you see when you enter the site. In the example below, there is one Draft Quote showing up.

1. Refresh your Submitted Quotes to check if they were priced
2. Create a New Draft Quote and configure your servers
3. Status Selectors enables you to view the desired category of Quotes
4. List of Quotes in your Dashboard for the selected Status
Quote statuses

**Drafts**: New Quote in preparation. Can be modified at will. Items can be added or removed. The “Submit” action will move it to status “Submitted”.

**Submitted**: Waiting to be priced by Intel. Can only be rejected. The “Check-Status” action will refresh the Quote to see if it has been “Priced”.

**Priced**: A price is set for all items on the Quote. It’s up to the Disti (working with the Reseller to decide if the items are “Accepted” or “Rejected”. The “Confirm” action sets the final status.

**Accepted**: If a Quote has at least one “Accepted” item, it will be displayed in this category. An MM# will be provided by Intel, once the acceptance is processed.

**Rejected**: The Quote was “Rejected”. It can only be copied as a new “Draft” Quote.

**Expired**: No decision (Accept/Reject) has been taken in the allowed timeframe. The Quote expired. It can be “Re-submit” as is or used to create a copy (new “Draft”).
### A Quote in the Dashboard

1. **Quote Name**, represent the deal name
2. **Quote ID**, single deal number
3. **Quote status**
4. **Line item number**
5. **Product name and short description**
6. **MM#** - Number to order in WOM, only when Quote is Accepted
7. **Quantity requested**

**Example:**

<table>
<thead>
<tr>
<th>ID</th>
<th>Product</th>
<th>MM#</th>
<th>Qty</th>
<th>Unit Price</th>
<th>Total Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Intel® Compute Module HNS7200AP Family H2216XXL2, HNS7200AP, 7250</td>
<td>6</td>
<td>100</td>
<td>$24,670.00</td>
<td>$246,700.00</td>
</tr>
<tr>
<td>20</td>
<td>Intel® Server Board S2600WT Family R2208WTYCC1R, ES-2637 V4, 5.30 GHZ 64GB 2400MHZ X24</td>
<td>3</td>
<td>300</td>
<td>$18,459.00</td>
<td>$55,377.00</td>
</tr>
</tbody>
</table>

**Additional Info:**
- **Created:** 2017-02-22 14:23:52
- **Submitted:** 2017-02-22 16:32:08
- **Valid To:** 2017-03-21
- **Total Price:** $203,397.00
A Quote in the Dashboard (continued)

8. Unit Price (not visible to Reseller)
9. Quote creation and submitted (when was it submitted to Intel) date
10. Quote validity date
11. Total Price using provided quantities (not visible to Reseller)
12. Action buttons (Open, View, etc.)
13. Copy Quote button (not for Disti)
14. Delete/Reject Quote button
From the Dashboard, use the button to start the process. Some fields are necessary such as:

- Quotation name: Deal name or reference number
- End Customer Name (Company)
- Delivery Country
- REQ Date (Requested Delivery Date)
- Distributor partner

Other Reseller Partners are optional:

- FSE: Field Sales Engineer
- BDM: Business Development Manager

The Delivery Notes will be read by Intel personnel.
Creating a new Quote - Items

1. **Product Catalog**: Adding items is simple. Select the item you want and add it using the “+” sign on the right. The item will then be added to the Product list on the right panel.

2. For each item in the list, a configuration status icon might show up. These indicate whether your configuration is incomplete or inconsistent.

3. **Configuration button**, executes the Configurator

4. **Quantity**: can be set directly or using the up and down arrows

5. Copy the item. The new one is added at the end of the Product list

6. Delete the item. Prompt for confirmation and then delete permanently.
Each configuration is presented as a questionnaire. You start answering the questions and that determines the possible values for other questions or even lock them down as only one value is possible.

There is also a series of categories on the left. The symbol seen there indicates if there are issues (orange triangle with exclamation mark or circled red X) or if everything is fine (circled green checkmark).

When you completed your configuration, you can save it or cancel and back out.
Configuring a Server – Screen details

1. Save Configuration and Exit
2. Cancel Configuration and Exit (prompt user)
3. Product Name
4. Categories and status – green checkmark is good, orange and red are incomplete or inconsistent
5. Red star indicates mandatory question
6. Dropdowns contains possible answers
7. Information displayed (grayed out), cannot be changed directly
Submit to Intel for Pricing

Once you fill the Quote header fields and add all the configured items, click on the “Submit” button for Intel to price.

When ready, the “Submit” button (1) is available and a prompt will ask you to confirm (2). After you click “Yes”, the Quote is send over the Intel systems and will be Priced. Once that process is complete, an email will be sent to notify the Disti.
Once a Quote has been Priced, the detail screen will give new options to Disti. Among those, the ability to “Re-submit”.

1. Reject the item(s) you want to “Re-submit” by clicking the corresponding field(s) on the Accept/Reject column. The line will turn red.

2. Click on the “Re-submit” action.

3. A confirmation prompt appears and you can either confirm the action or cancel it.

Intel will look at the request and provide an answer with either a better pricing or the same as before.
Accept/Confirm a Quote (Disti)

1. Ensure only the items the Reseller wants to order are accepted. Click on the icons to toggle the status.

2. Adjust the required quantity for each accepted items as per the Reseller

3. Adjust the REQ Date to the date required by the Reseller

4. Click on the “Confirm” action

5. Confirm or cancel Acceptance of the items.
Reject a Quote

A rejected Quote is set to a final status and cannot be changed. It can be copied to start a new Draft Quote.

There are two ways of rejecting a Quote:

1. From the Dashboard click on the X icon on the right of a Quote. Confirm on the following prompt.

2. From a Quote detail page (except for Draft Quotes), the “Reject” action is available. Confirm on the following prompt.
Copy an existing Quote

Quotes can be copied to create a new “Draft” version of it. These new Quotes can then be modified as desired including the items and their configuration.

There are two ways of copying a Quote:

1. From the Dashboard click on the double sheet icon on the right of a Quote.

2. From a Quote detail page, the “Create Copy” action is available.

When a Quote is copied, the Quotation name is cleared and you need to enter a new one. The REQ Date is also reset to current date. Other values are retained.
Resources

• Online resources including Q&A, Overview Presentation, Tool Demo: intel.com/dcb

• CTO Tool direct link: https://orderconfigurator.intel.com

• CTO Tool Technical Support or Access/Login help: CTO_Tool_Help@Intel.com

• For product related questions, contact your Intel representative or authorized distributor.