



CTO Tool Tutorial

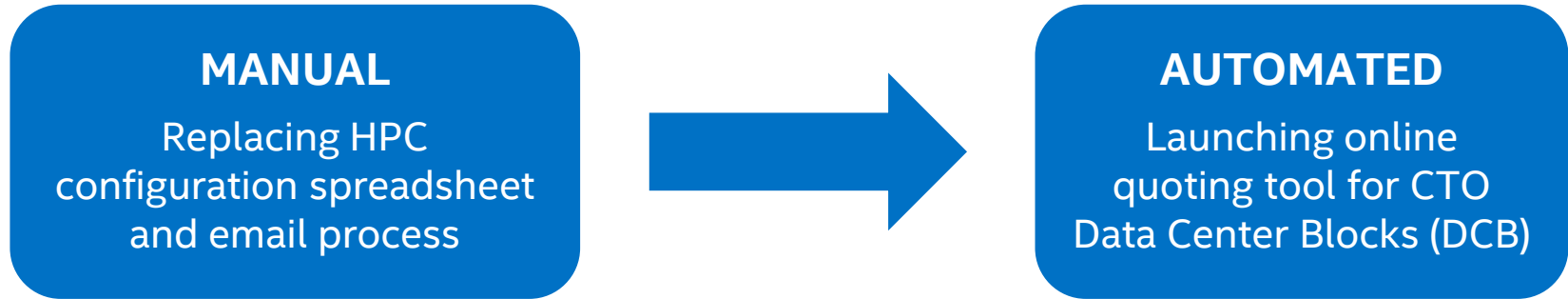
April 2017

Prepared by Patrick Latour

Tutorial Content

- About the CTO Tool
- Quote Dashboard
- Quote statuses
- A Quote in the Dashboard
- Creating a new Quote
- Configuring a Server
- Submit to Intel for Pricing
- Re-Submit – Asking for a reprice
- Accept/Confirm a Quote
- Reject a Quote
- Copy an existing Quote

Simplifying Quoting for Intel Data Center Blocks



- 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?

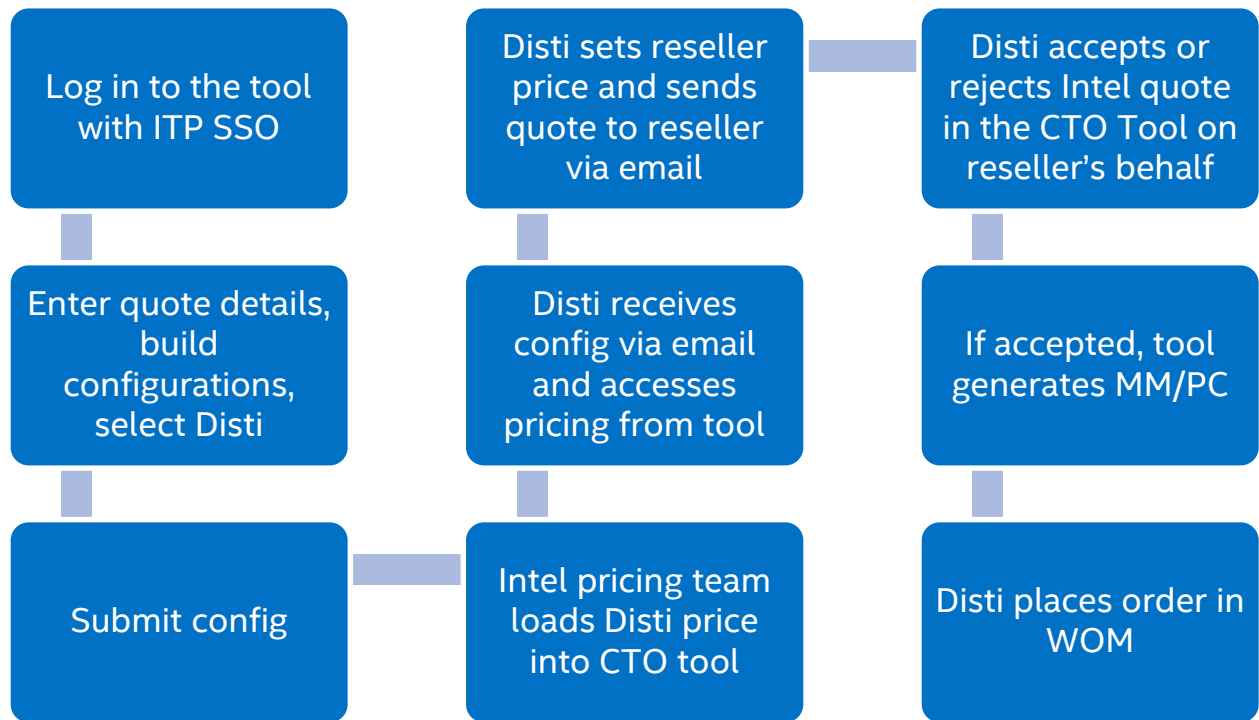
SERVER CONFIGURATOR TOOL

- 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



How to access the CTO Tool

- Access to the tool requires ITP login with NDA credentials
- Access locations:
 - ITP Partner Website – <http://www.intel.com/content/www/us/en/technology-provider/products-and-solutions/overview.html>
 - Via direct link – <https://orderconfigurator.intel.com>
 - Intel.com DCB Product Pages – [intel.com/dcb](https://www.intel.com/dcb)
- Access login can be requested from your Intel Representative or via email – 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

Project XYZ Draft Open

ID	Product	MM#	Qty	Unit Price	
10	Intel® Server Board S2600WT Family		1	\$0.00	🔍 ✖

Additional Info

Created: 2017-03-30 18:29:31 Valid To: Total Price:

Submitted:

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”.

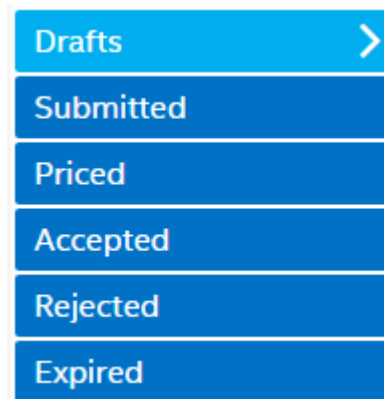
Submitted: Waiting to be priced by Intel. Can only be rejected. The “Check-Status” action will refresh the Quote to see if it has been “Priced”.

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

1 Project NZT		2 ID: 20000280		3 Priced		12 View	
4 ID	5 Product	6 MM#	7 Qty	8 Unit Price	13	14	x
10	Intel® Compute Module HNS7200AP Family H2216XXLR2, HNS7200AP, 7250 (16GB 1.40 GHZ 68C), 32GB RDIMM 2400MHZ X4		6	\$24,670.00			
20	Intel® Server Board S2600WT Family R2208WTTYC1R, E5-2637 V4 15M 3.50 GHZ, 64GB LRDIMM 2400MHZ X24,		3	\$18,459.00			
Additional Info							
9 Created: 2017-02-22 14:23:52 Submitted: 2017-02-22 16:32:08		10 Valid To: 2017-03-21		11 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.)

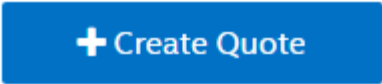
13. Copy Quote button (not for Disti)

14. Delete/Reject Quote button

1 Project NZT		2 ID: 20000280		3 Priced		12 View	
4 ID	5 Product	6 MM#	7 Qty	8 Unit Price	13	14	
10	Intel® Compute Module HNS7200AP Family H2216XXLR2, HNS7200AP, 7250 (16GB 1.40 GHZ 68C), 32GB RDIMM 2400MHZ X4		6	\$24,670.00			
20	Intel® Server Board S2600WT Family R2208WTTYC1R, E5-2637 V4 15M 3.50 GHZ, 64GB LRDIMM 2400MHZ X24,		3	\$18,459.00			
Additional Info							
9 Created: 2017-02-22 14:23:52 Submitted: 2017-02-22 16:32:08		10 Valid To: 2017-03-21		11 Total Price: \$203,397.00			

Creating a new Quote - Header

From the Dashboard, use the

 + Create Quote

button to start the process. Some fields are necessary such as:

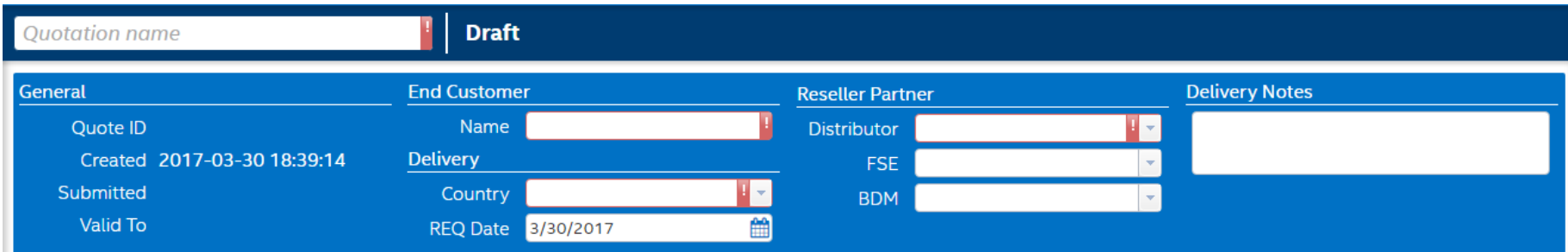
- Quotation name: Deal name or reference number
- End Customer Name (Company)

- 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.



The screenshot shows a web form for creating a new quote. At the top, there is a text input field for 'Quotation name' and a 'Draft' status indicator. Below this, the form is divided into four main sections: 'General', 'End Customer', 'Reseller Partner', and 'Delivery Notes'. The 'General' section includes fields for 'Quote ID', 'Created' (2017-03-30 18:39:14), 'Submitted', and 'Valid To'. The 'End Customer' section includes 'Name', 'Delivery', 'Country', and 'REQ Date' (3/30/2017). The 'Reseller Partner' section includes 'Distributor', 'FSE', and 'BDM'. The 'Delivery Notes' section is a large empty text area.

General	End Customer	Reseller Partner	Delivery Notes
Quote ID	Name	Distributor	
Created 2017-03-30 18:39:14	Delivery	FSE	
Submitted	Country	BDM	
Valid To	REQ Date 3/30/2017		

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 indicates 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.

The screenshot shows a two-pane interface. The left pane, titled 'Product Catalog', lists four Intel products, each with a '+' button to its right. A red circle with the number '1' is positioned above the first '+' button. The right pane, titled 'Product', shows one item: 'Intel® Compute Module HNS7200AP Family'. Above this item is a row of controls: a red circle with '2' above a warning icon, a red circle with '3' above a gear icon, a quantity field with '1' and arrows (with a red circle '4' above it), a red circle with '5' above a copy icon, and a red circle with '6' above a delete icon.

Configuring a Server

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.

Intel® Compute Module HNS7200AP Family

Save

Cancel

System

Processor

Memory

RAID

Drives

Networking

Options

Chassis *

Chassis Form Factor

Drive Form Factor

Default Front Drive Cap.

Total Front Drive Cap.

Compute Module *

Compute Module Qty

2U

12 Drives

16 Drives

1

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

Intel® Compute Module HNS7200AP Family

Save

Cancel

System

Processor

Memory

RAID

Drives

Networking

Options

Chassis *

Chassis Form Factor

Drive Form Factor

Default Front Drive Cap.

Total Front Drive Cap.

Compute Module *

Compute Module Qty

2U

12 Drives

16 Drives

1

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.

The screenshot displays a web application interface for submitting a quote. On the left is a navigation sidebar with icons for 'Dashboard', 'Submit' (marked with a red '1'), and 'Create Copy'. The main content area is titled 'Demo Project' and contains a 'General' section with fields for 'Quote ID', 'Created' (2017-02-23 01:29:16), 'Submitted', and 'Valid To'. Below this is a 'Product Catalog' section listing items like 'Intel® Server Board S2600WT Family' and 'Intel® Comp HNS7200AF'. A modal dialog box is open in the foreground, asking 'Are you sure?' and 'Please confirm quote submission for pricing.' with 'Yes' and 'No' buttons, where the 'Yes' button is marked with a red '2'.

Re-Submit – Asking for a reprice (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.

Valid To 2017-05-29

REQ D

Are you sure?

Do you want to re-submit?


Cancel Resubmit

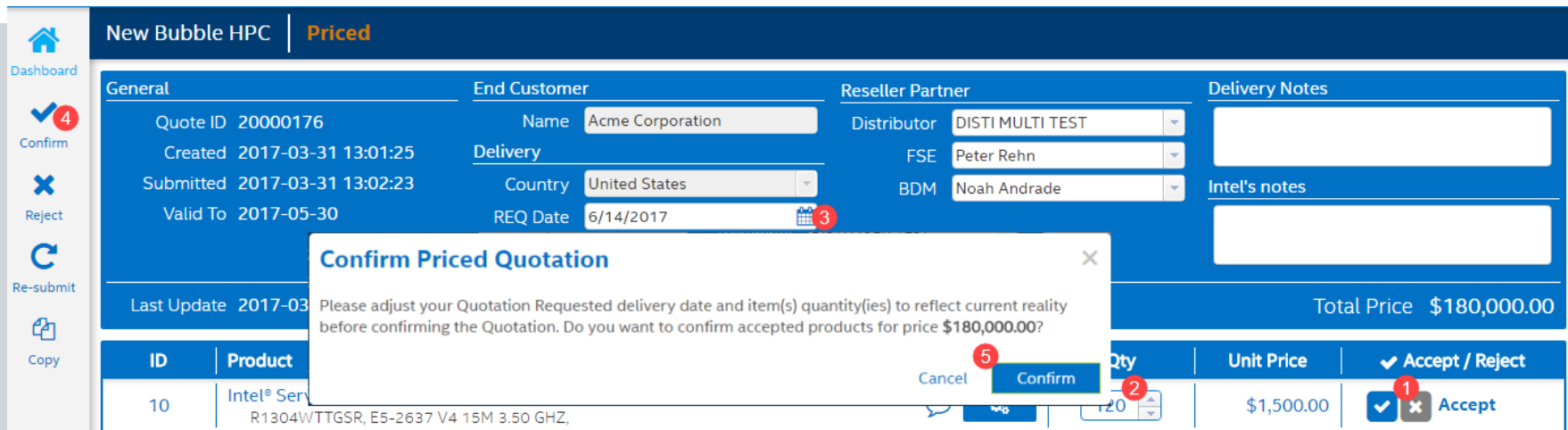
Last Update 2017-03-30 21:23:07

Total Price \$26,400.00

ID	Product	Qty	Unit Price	Accept / Reject
10	Intel® Server Board S2600WT Family R1304WTTGSR, E5-2630 V4 25M 2.20 GHZ,	22	\$1,200.00	✓ ✕ Accept
20	Intel® Compute Module HNS2600TP Family H2224XXKR2, HNS2600TP24R, E5-2630 V4 25M 2.20 GHZ, 32GB RDIMM 2400MHZ X7	10	\$1,500.00	✓ ✕ Reject

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.



The screenshot displays the Intel quote management interface. The top navigation bar shows 'New Bubble HPC' and 'Priced'. The main content area is divided into several sections: 'General', 'End Customer', 'Reseller Partner', and 'Delivery Notes'. The 'General' section includes fields for Quote ID (20000176), Created (2017-03-31 13:01:25), Submitted (2017-03-31 13:02:23), and Valid To (2017-05-30). The 'End Customer' section shows Name (Acme Corporation), Delivery Country (United States), and REQ Date (6/14/2017). The 'Reseller Partner' section includes Distributor (DISTI MULTI TEST), FSE (Peter Rehn), and BD (Noah Andrade). The 'Delivery Notes' section is empty. A 'Confirm Priced Quotation' dialog box is open in the center, with the text: 'Please adjust your Quotation Requested delivery date and item(s) quantity(ies) to reflect current reality before confirming the Quotation. Do you want to confirm accepted products for price \$180,000.00?'. The dialog has 'Cancel' and 'Confirm' buttons. The 'Confirm' button is highlighted with a red circle '5'. Below the dialog, a table lists the items. The first item is Intel® Server with ID 10, Product R1304WTTGSR, E5-2637 V4 15M 3.50 GHZ, Qty 20, Unit Price \$1,500.00, and a status of 'Accept / Reject' with a red circle '1' over the 'Accept' button. The total price is \$180,000.00. On the left sidebar, there are navigation icons: Dashboard, Confirm (with a red circle '4'), Reject, Re-submit, and Copy.

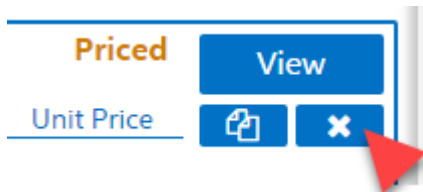
ID	Product	Qty	Unit Price	Accept / Reject
10	Intel® Serv R1304WTTGSR, E5-2637 V4 15M 3.50 GHZ,	20	\$1,500.00	Accept

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

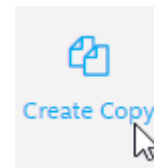
Quotes can be copied to create a new “Draft” version of it. These new Quotes can then be modified as desired including the items and their configuration.

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.

A screenshot of a form. The top part shows a text input field for "Quotation name" which is empty. To the right of the field is a red exclamation mark icon and a tooltip message that says "This value is required." Below this, there is another text input field for "REQ Date" which contains the value "2/24/2017". To the right of the date field is a calendar icon.

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.