



Siebel Phase 2a

IWD Training Guide



Table of Contents

Import/Export Functionality	4
Pricing Change Flag	18
Agreements – Pre & Post Approval.....	19

Import/Export Functionality

The Import/Export functionality can be used to add line items when creating a new quote or to modify line item attributes like Qty, ordering of line items, Req. Buy & Req. Sell (US) and Req. Buy & Foreign Req. Sell (Canadian) on existing quotes, as long as the quote is in the correct status.

In order to update an existing quote, the status must be in Pending Submission. Additionally:

1. The import feature cannot be used when the latest revision of the quote is in Accepted, Cancelled or Pending Sales Review status.
2. Non-active versions of the quote cannot be updated using the import feature.

Prior to Import/Export

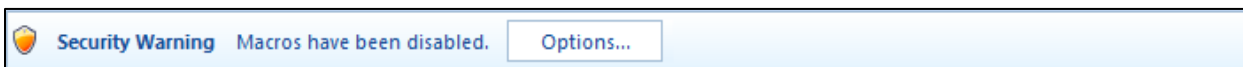
Before starting the process of working with the import/export functionality in Siebel, make sure you have enabled macros in Microsoft Excel. This is required for the import/export template to function properly in Excel.

Instructions for enabling macros can be found using the link below that correlates to the version of Microsoft Excel that you are running on your computer.

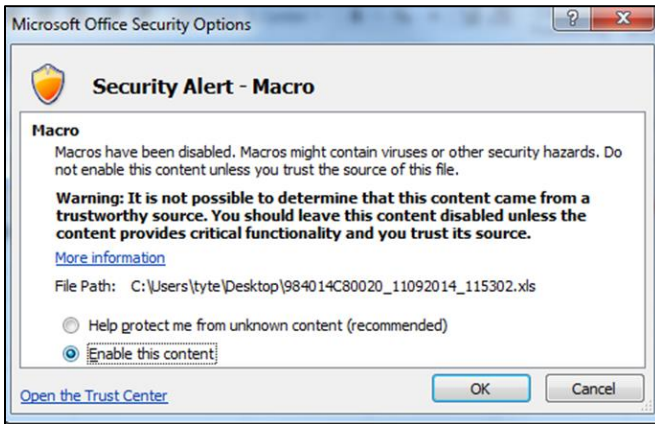
Excel 2007

We recommend that you set your macro trust settings to “Disable all macros with notification” using the instructions found in the link below. This will disable all macros and give you a security alert if macros are present. You can then choose to run macros on a case by case basis.

<http://office.microsoft.com/en-us/excel-help/enable-or-disable-macros-in-office-documents-HA010031071.aspx#BM12>



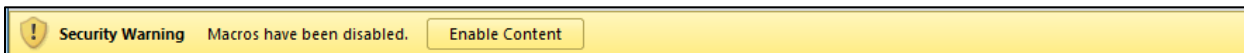
When you open the import template in Excel, you will see the message above. Click “Options” and then select “Enable this content” (as shown below) to allow the macro to run.



Excel 2010, 2013

We recommend that you set your macro trust settings to “Disable all macros with notification” using the instructions found in the link below. This will disable all macros and give you a security alert if macros are present. You can then choose to run macros on a case by case basis.

<http://office.microsoft.com/en-us/excel-help/enable-or-disable-macros-in-office-files-HA010354316.aspx#Toc311698312>



When you open the import template in Excel, you will see the message above. Click “Enable Content” to allow the macro to run.

To Begin

1. The import/export functionality only imports line items so you will need to create the quote header before you execute the import/export process.

It is also suggested that you add at least one line item manually to serve as a guide when working with the exported template. To begin, you will perform the same steps as creating a new quote.

- Log in and click on the Quotes Tab. In the Quotes home screen, click on My Quotes – IWD and begin the process of creating a new quote

File Edit View Navigate Query Tools Help

Quote:

Home

Accounts

Quotes

Update Requests

User Profile

Frequently Viewed Quotes

- My Quotes – DSO
My Quotes – DSO
- My Team's Quotes - DSO
My Team's Quotes - DSO
- All Quotes – DSO
All Quotes – DSO
- My Quotes – Pricing
My Quotes – Pricing
- All Quotes Across Organization – Pricing
All Quotes Across Organization – Pricing
- Quotes Pending HQ Approval – Pricing
Quotes Pending HQ Approval – Pricing
- My Quotes – IWD
My Quotes – IWD
- All Quotes – IWD
All Quotes – IWD

iHelp

Search

Agreement#<Case Sensitive>

Project Name<Case Sensitive>

Business Segment<Case Sensitive>

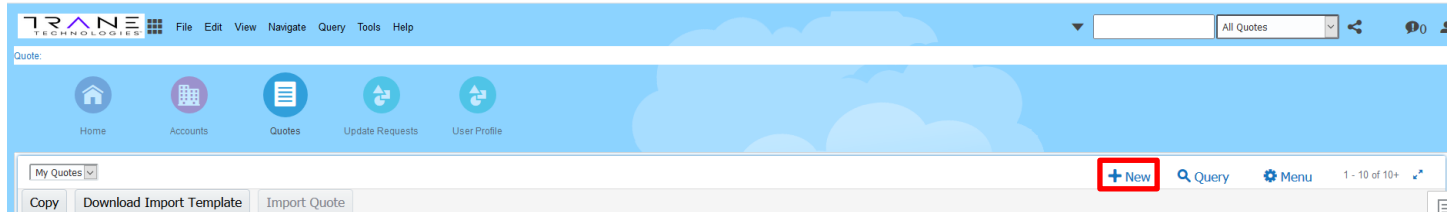
Status<Case Sensitive>

Account Name (IWD)<Case Sensitive>

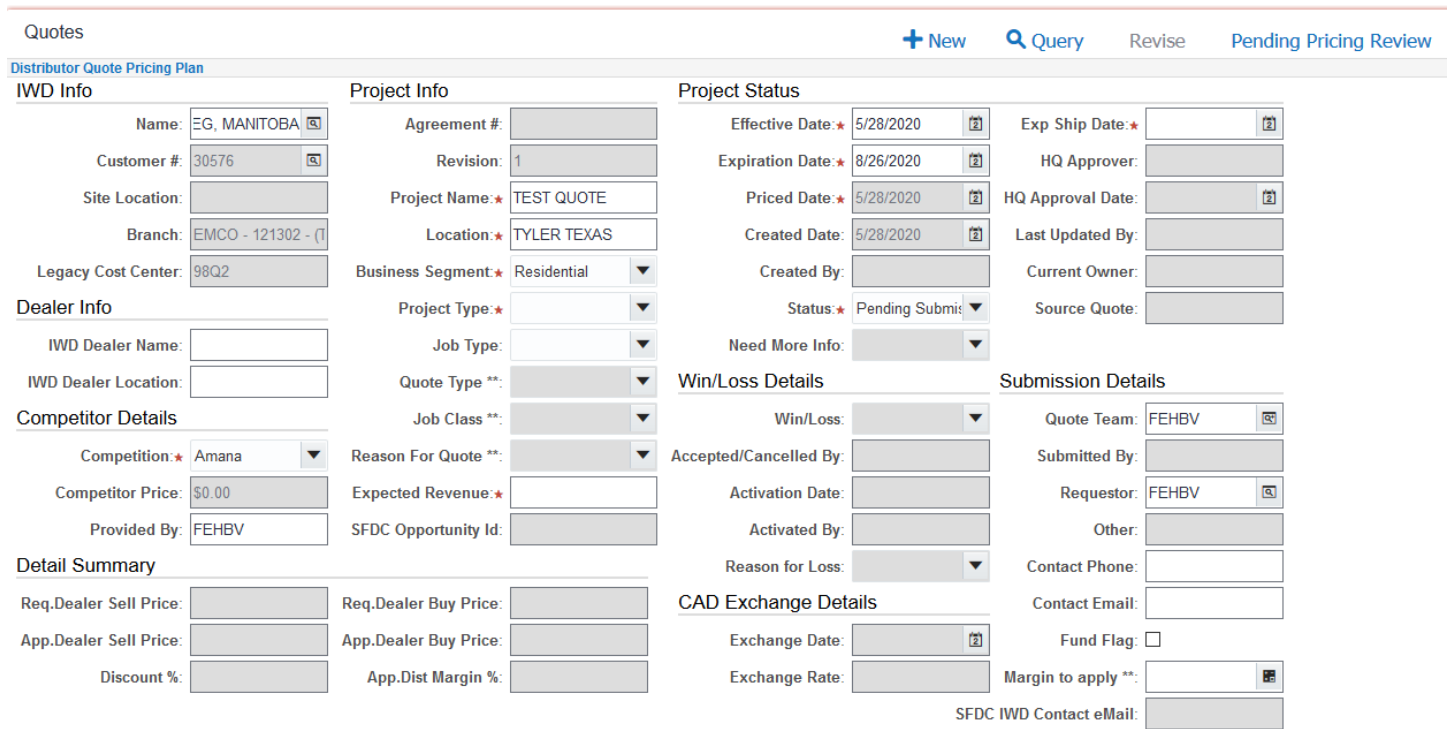
Dealer Name (IWD)<Case Sensitive>

Go

- Click "New" to start a new quote.



- Begin creating your quote by entering the header information either in the list view or form view as seen below.



The screenshot shows the Trane Technologies software interface for creating a new quote. The 'New' button is highlighted in a red box. The interface is divided into several sections: IWD Info, Project Info, Project Status, Dealer Info, Competitor Details, Detail Summary, Win/Loss Details, and Submission Details. Each section contains various input fields for creating a quote.

- The required fields when creating the header for a Residential quote are:
 - Dealer Info
 - IWD Dealer Name
 - IWD Dealer Location
 - Competitor Info
 - Competition – click arrow for drop down menu and choose competitor
 - Project Info
 - Project name
 - Location
 - Business Segment: Residential

- Project Type
- Submission Details
 - Margin to Apply

Click “Save” to create the quote.

Quotes

+ New Query Revise Pending Pricing Review Accept Cancel Save

Distributor Quote Pricing Plan

IWD Info

Name: EG, MANITOBA

Customer #: 30576

Site Location:

Branch: EMCO - 121302 - (T)

Legacy Cost Center: 98Q2

Agreement #:

Revision: 1

Project Name: TEST QUOTE

Location: TYLER TEXAS

Business Segment: Residential

Project Type: Multi-Family - NC

Job Type:

Quote Type:

Job Class:

Reason For Quote:

SFDC Opportunity Id:

Effective Date: 5/28/2020

Expiration Date: 8/26/2020

Priced Date: 5/28/2020

Created Date: 5/28/2020

Created By:

Status: Pending Submit

Need More Info:

Exp Ship Date:

HQ Approver:

HQ Approval Date:

Last Updated By:

Current Owner:

Source Quote:

Dealer Info

IWD Dealer Name: BLALOCK TEST

IWD Dealer Location: TYLER

Competitor Details

Competition: Amana

Competitor Price: \$0.00

Provided By: FEHBV

Submission Details

Quote Team: FEHBV

Submitted By:

Requestor: FEHBV

Other:

Contact Phone:

Contact Email:

Win/Loss Details

Win/Loss:

Accepted/Cancelled By:

Activation Date:

Activated By:

Reason for Loss:

CAD Exchange Details

Exchange Date:

Exchange Rate:

Fund Flag:

Margin to apply: 12%

SFDC IWD Contact eMail:

Detail Summary

Req.Dealer Sell Price:

App.Dealer Sell Price:

Discount %:

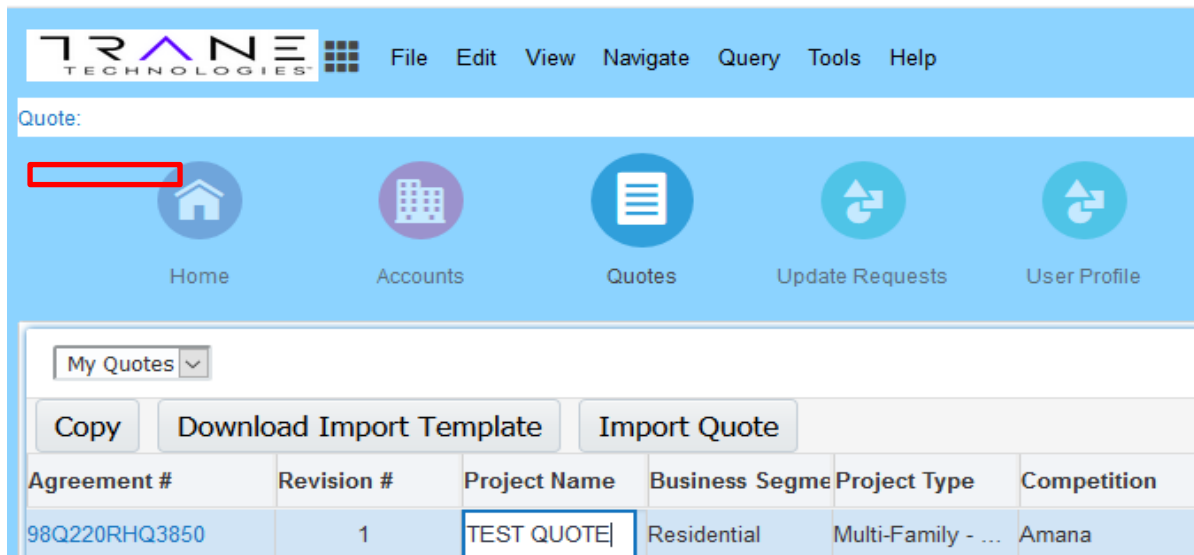
Req.Dealer Buy Price:

App.Dealer Buy Price:

App.Dist Margin %:

Expected Revenue:

- Once you have clicked save, Siebel will assign a quote number to the header information that you created. To view the quote details and manually add the first item on the quote, scroll up to the list view and click on the Agreement Number of the quote you just created.



Quote:

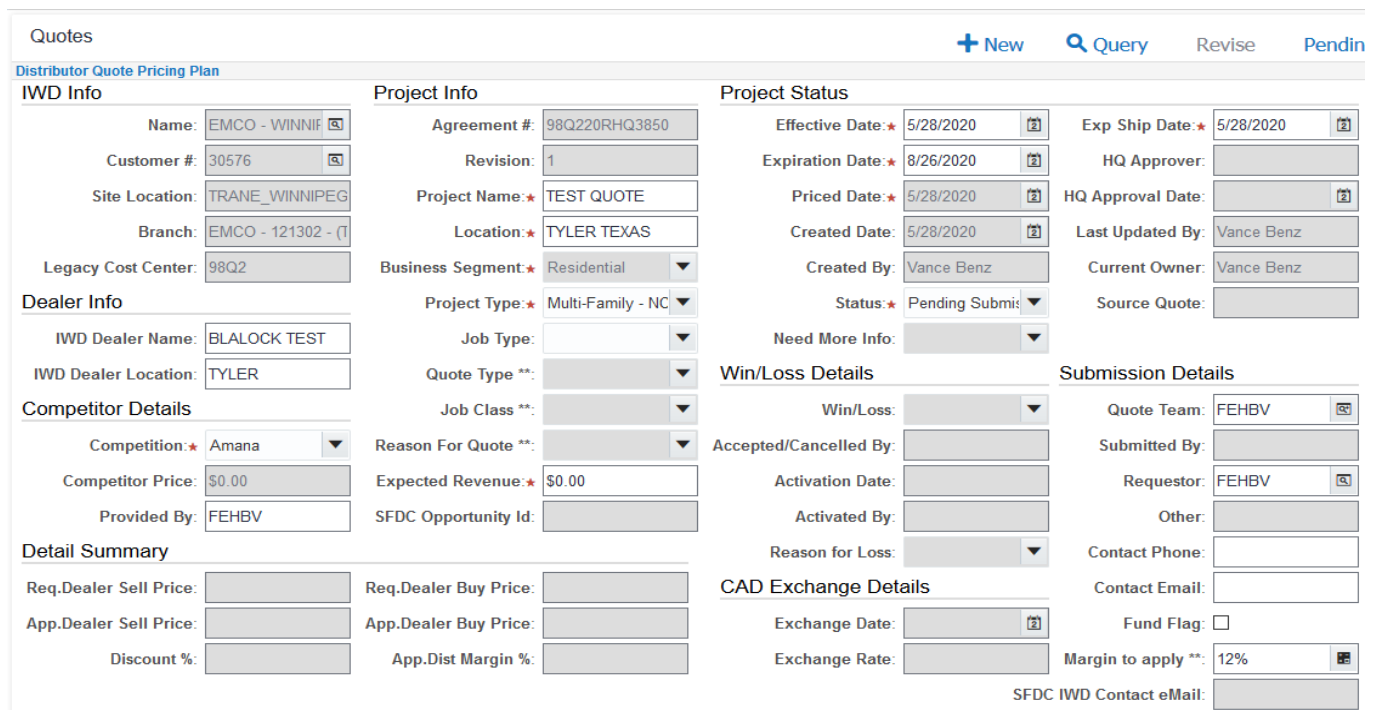
Home Accounts Quotes Update Requests User Profile

My Quotes

Copy Download Import Template Import Quote

Agreement #	Revision #	Project Name	Business Segme	Project Type	Competition
98Q220RHQ3850	1	TEST QUOTE	Residential	Multi-Family - ...	Amana

Quote Details



Quotes [+ New](#) [Query](#) [Revise](#) [Pendig](#)

Distributor Quote Pricing Plan

IWD Info

Name: EMCO - WINNIF
Customer #: 30576
Site Location: TRANE_WINNIPEG
Branch: EMCO - 121302 - (T)
Legacy Cost Center: 98Q2

Dealer Info

IWD Dealer Name: BLALOCK TEST
IWD Dealer Location: TYLER

Competitor Details

Competition: Amana
Competitor Price: \$0.00
Provided By: FEHBV

Project Info

Agreement #: 98Q220RHQ3850
Revision: 1
Project Name: TEST QUOTE
Location: TYLER TEXAS
Business Segment: Residential
Project Type: Multi-Family - NC
Job Type:
Quote Type:
Job Class:
Reason For Quote:
Expected Revenue: \$0.00
SFDC Opportunity Id:

Project Status

Effective Date: 5/28/2020
Expiration Date: 8/26/2020
Priced Date: 5/28/2020
Created Date: 5/28/2020
Created By: Vance Benz
Status: Pending Submis
Need More Info:
Exp Ship Date: 5/28/2020
HQ Approver:
HQ Approval Date:
Last Updated By: Vance Benz
Current Owner: Vance Benz
Source Quote:

Win/Loss Details

Win/Loss:
Accepted/Cancelled By:
Activation Date:
Activated By:
Reason for Loss:

Submission Details

Quote Team: FEHBV
Submitted By:
Requestor: FEHBV
Other:
Contact Phone:
Contact Email:
Fund Flag:
Margin to apply: 12%
SFDC IWD Contact eMail:

CAD Exchange Details

Exchange Date:
Exchange Rate:

Detail Summary

Req.Dealer Sell Price:
App.Dealer Sell Price:
Discount %:
Req.Dealer Buy Price:
App.Dealer Buy Price:
App.Dist Margin %:

- Click on “Add Items” to query for the model that you want to add or simply click “New” in the line items section and fill in the required information.

- Item #
- Quantity

The screenshot shows the 'Line Items' section of a software interface. At the top, there are tabs: 'Line Items', 'Notes', 'Attachments', 'Agreement', 'Quote Team', and 'Supporting Information'. Below these, there's a sub-header 'Line Items' and a toolbar with buttons: '+ New', 'Delete', 'Query', and 'Menu'. The main area contains a table with columns: 'Line #', 'Order', 'Item', 'Qty', 'Qty Shipped', 'Everyday Price', 'Competitor Price', 'Req. Sell Price', 'Req. Buy Price', 'Req. Dist Margin', 'Rebate Amt.', 'App. Sell Price', 'App. Buy Price', 'App. Dist Margin', 'Disc%', and 'Qty Claimed'. The 'Item' column for line 1 is highlighted with a red box, and the 'Qty' column for line 1 is also highlighted with a red box.

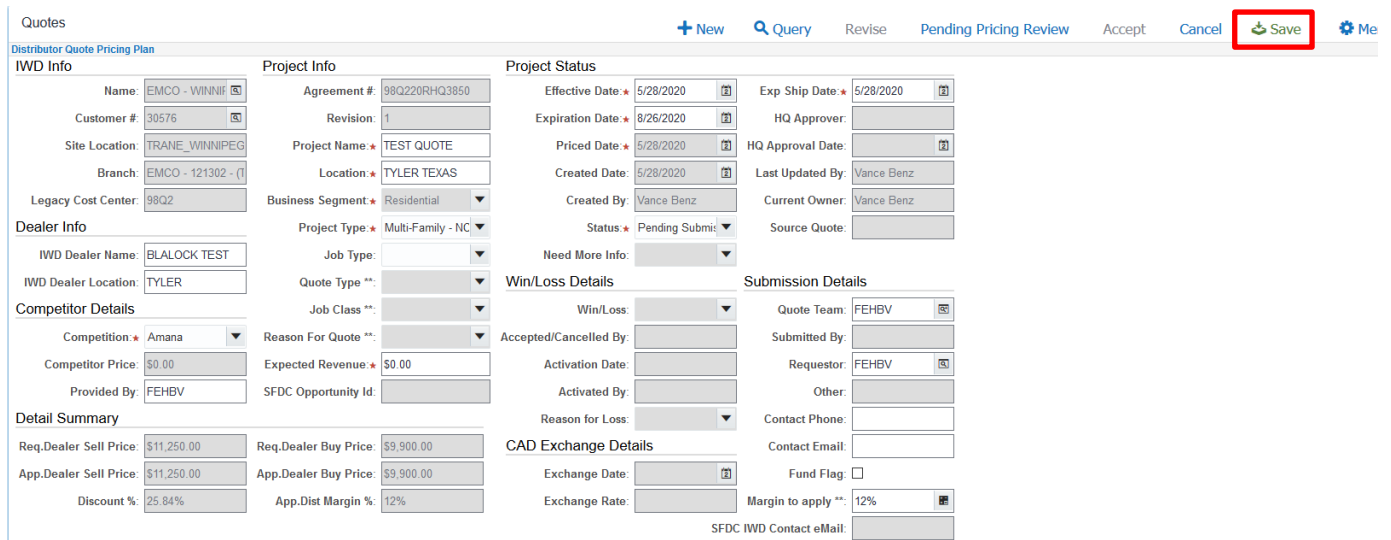
- Once you have entered the item number and quantity, click “Get Price”. A pop up will display that says “Retrieving Pricing Information” while the system pulls pricing from R12.

The screenshot shows the 'Line Items' section of a software interface. At the top, there are tabs: 'Line Items', 'Notes', 'Attachments', 'Agreement', 'Quote Team', and 'Supporting Information'. Below these, there's a sub-header 'Line Items' and a toolbar with buttons: 'Add Items', 'Package', 'UnPackage', 'Get Price', 'ReCalculate', 'ReOrder', and 'FlexCalc'. The main area contains a table with columns: 'Line #', 'Order', 'Item', 'Qty', 'Qty Shipped', 'Everyday Price', 'Competitor Price', 'Req. Sell Price', 'Req. Buy Price', and 'Req. Dist Margin'. The 'Get Price' button is highlighted with a red box. The 'Qty' column for line 1 is also highlighted with a red box.

- Once pricing has been loaded, enter your Requested Sell Price. This will automatically populate numbers in the other required fields based on the amount you entered for your Margin to Apply.

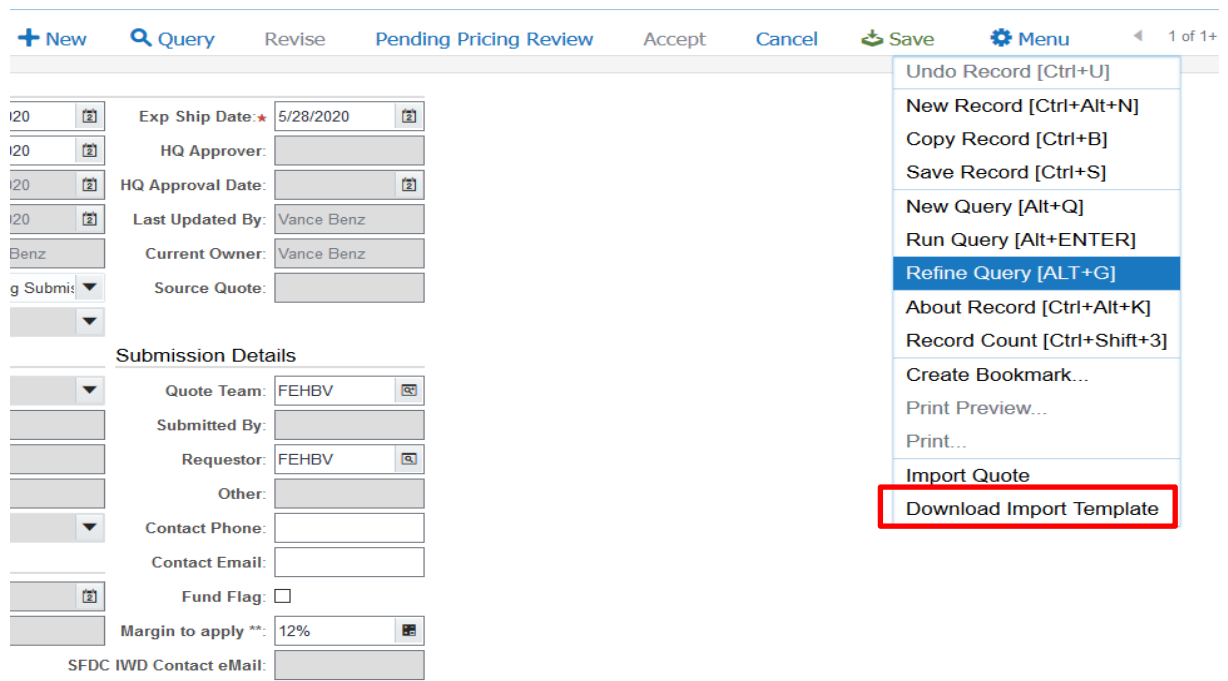
The screenshot shows the 'Line Items' section of a software interface. At the top, there are tabs: 'Line Items', 'Notes', 'Attachments', 'Agreement', 'Quote Team', and 'Supporting Information'. Below these, there's a sub-header 'Line Items' and a toolbar with buttons: '+ New', 'Delete', 'Query', and 'Menu'. The main area contains a table with columns: 'Line #', 'Order', 'Item', 'Qty', 'Qty Shipped', 'Everyday Price', 'Competitor Price', 'Req. Sell Price', 'Req. Buy Price', 'Req. Dist Margin', 'Rebate Amt.', 'App. Sell Price', 'App. Buy Price', 'App. Dist Margin', 'Disc%', and 'Qty Claimed'. The 'Req. Sell Price' field for line 1 is highlighted with a red box.

9. After you have entered all prices, click “Save”. You have now completed the initial steps and are ready to begin the import/export process.



The screenshot shows the 'Distributor Quote Pricing Plan' form. The top navigation bar includes buttons for '+ New', 'Query', 'Revise', 'Pending Pricing Review', 'Accept', 'Cancel', and a highlighted 'Save' button. The form is divided into several sections: IWD Info, Project Info, Project Status, Dealer Info, Competitor Details, Detail Summary, Win/Loss Details, and Submission Details. Each section contains various input fields for data entry.

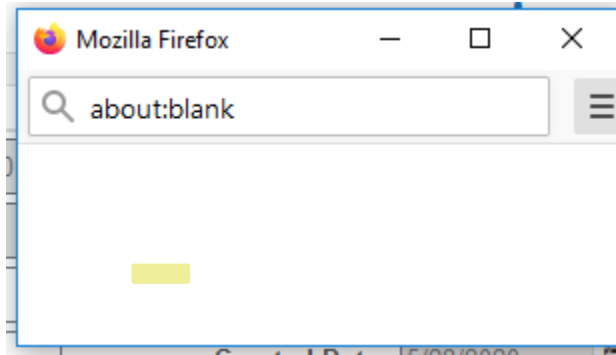
10. There are two ways to download/export the excel template:
 - a. Click the drop down “Menu” button in the line details portion of the quote and select “Download Import Template”



This screenshot shows the same form as before, but with the 'Menu' dropdown button in the top right corner clicked. A dropdown menu is visible, listing various actions such as 'Undo Record [Ctrl+U]', 'New Record [Ctrl+Alt+N]', 'Copy Record [Ctrl+B]', 'Save Record [Ctrl+S]', 'New Query [Alt+Q]', 'Run Query [Alt+ENTER]', 'Refine Query [ALT+G]', 'About Record [Ctrl+Alt+K]', 'Record Count [Ctrl+Shift+3]', 'Create Bookmark...', 'Print Preview...', 'Print...', 'Import Quote', and 'Download Import Template'. The 'Download Import Template' option at the bottom of the menu is highlighted with a red box.

b. Click on the “Download Import Template” button

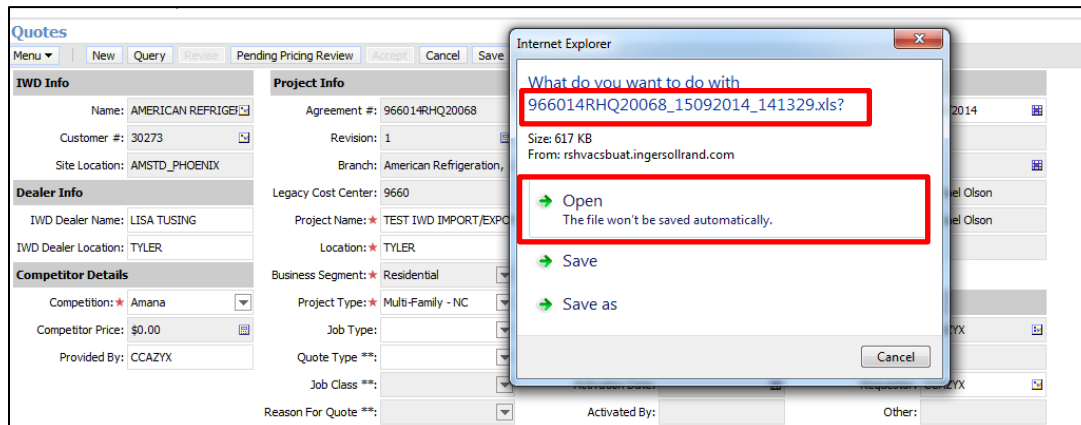
- A pop-up screen will appear



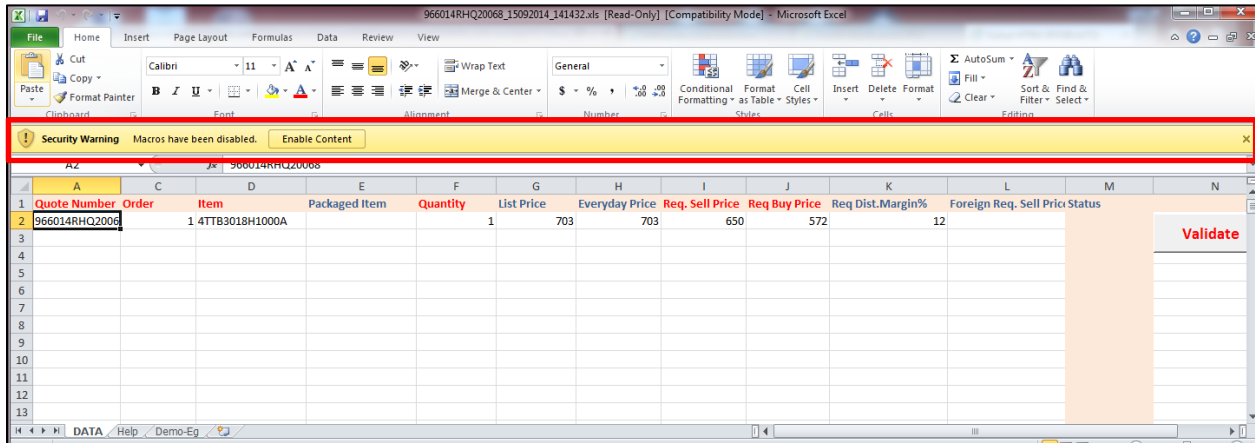
IMPORTANT: Always download a new template before starting the import process. Using an old template will cause errors.

11. Next, a pop up screen will appear that asks what you would like to do with xls file: Open, Save, or Save As. You can pick any of them as long as you save the file once you are finished working with it.

- Selecting “Open” – will open the file so that you can begin working on it immediately, however the file will not be automatically saved. You will have to do this from inside the Excel template by choosing the File menu and selecting Save or Save As
- The Default file name when saving the template is:
Quote #_Date_Time in Minutes and Seconds



12. Once the xls file is open, if macros are not enabled, a yellow “Security Warning” banner will appear letting you know macros have been disabled. Click the “Enable Content” button. This will enable macros and allow the template to function correctly.

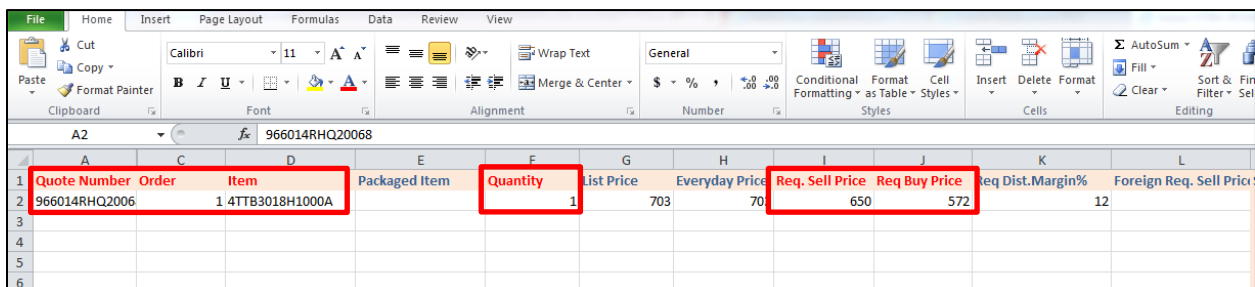


IMPORTANT: It is extremely important to emphasize that you only input information needed to import line items into the quote. Changing information such as moving column order, changing header names of columns or modifying the core information that makes up the template will cause it not to function properly. In short, only fill in the information that you need to execute the import/export functionality. **DO NOT** modify the existing information in the template in any way.

13. Required Fields

For IWD Users – Quote Number, Quantity, Order (line#), Req Buy AND Req. Sell Price are mandatory in the Excel template. They are easily identified by red text in their column header. **When working with Canadian Quotes, Foreign Req Sell is also a mandatory field.**

- Quote Number – you can only import line items for one quote per template. Column A (Quote Number) should have the same quote number listed for each line where models are present
- Order – numbers in this column designate the order in which the line item will appear on the quote.
Numbers listed in this column are also used in Column E when identifying models that you want to package. For more about Package Units please see the **Packaging a model/models In Excel section of this user manual**



14. Once all required fields are completed, validate the information.

- Click the “Validate” button in the template
- Successful validation (no errors) will produce green text reading “Validated” in the Status column T

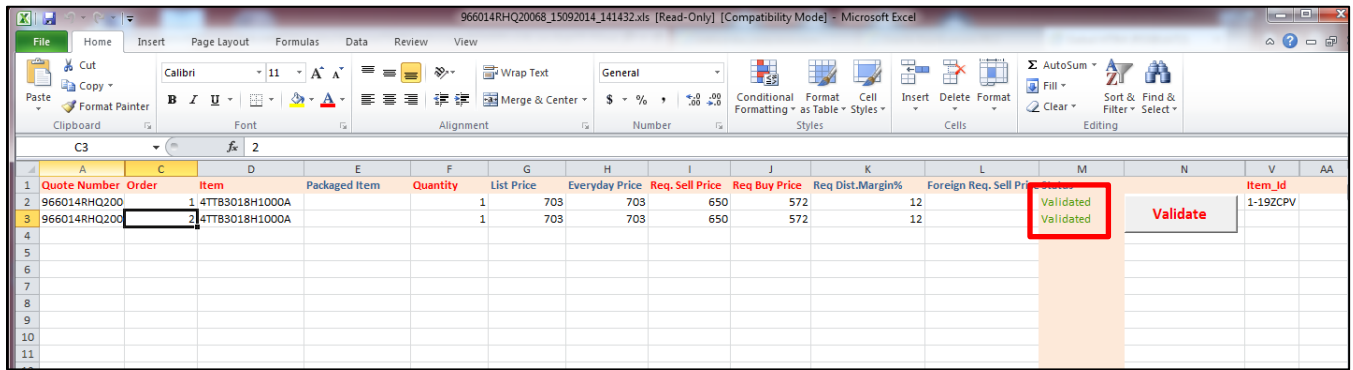
IMPORTANT: The Req Dist.Margin% field determines Req Buy Price values. If the Req. Dist.Margin% field contains a value, it will auto populate or replace the Req Buy Price field with the calculated Req Dist.Margin % when you click the “Validate” button. If the Req Dist.Margin% field is blank and the Req Buy Price field contains a value, clicking “Validate” will calculate the Req Dist.Margin% and auto populate the field.

Quote Number	Order	Item	Packaged Item	Quantity	List Price	Everyday Price	Req. Sell Price	Req Buy Price	Req Dist.Margin%	Foreign Req. Sell Price	Status	Item_Id
966014RHQ200		1 4TTB3018H1000A		1	703	703	650	572	12		Validated	1-192CPV

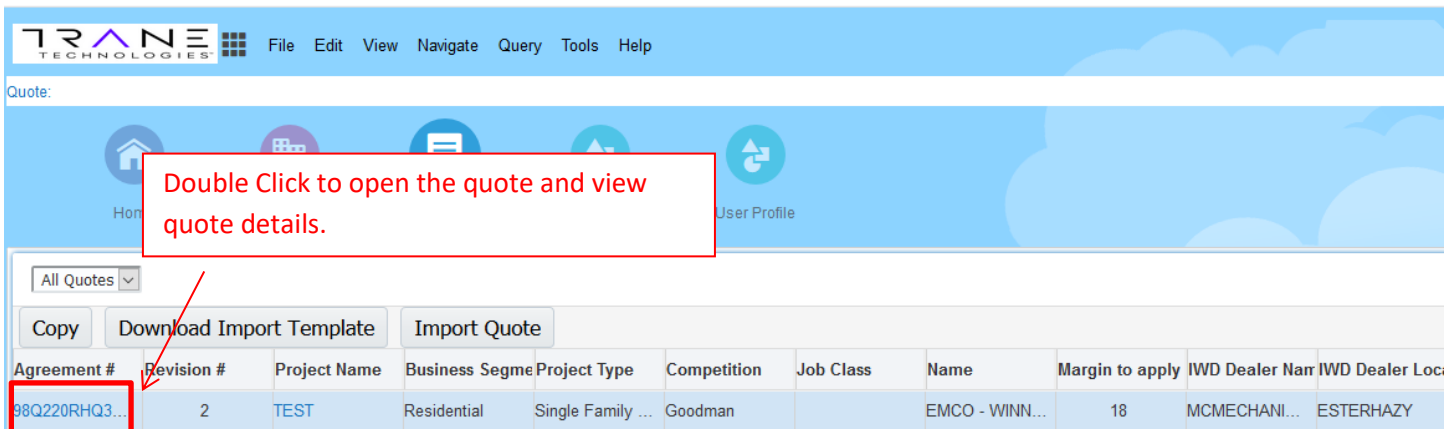
15. When the validation is NOT successful, i.e. there is an issue against a row/line item in Excel, then the system will display the status (Column T) in Red text so that users can easily identify erroneous lines. The text in the status field will start with the word “Error” followed by a message regarding the type of error that occurred. Double check that all required information is present and has been input correctly.

Quote Number	Order	Item	Packaged Item	Quantity	List Price	Everyday Price	Req. Sell Price	Req Buy Price	Req Dist.Margin%	Foreign Req. Sell Price	Status	Item_Id
966014RHQ200		1 4TTB3018H1000A		1	703	703	650	572	12		Validated	1-192CPV
966014RHQ20068		4TTB3018H1000A		1	703	703	650	572	12		Error:Some of th	ntered

16. Once all lines in excel have been successfully validated, save the excel template. You are now ready to begin the import process in Siebel.



17. Go into Siebel and pull up the quote you created to import line items. *Make sure you have opened the quote and the quote details are visible in the bottom portion of your screen.*



18. In the lower portion of the screen
- Click the "Menu" button at the top of the screen, and select "Import Quote" from the dropdown box

The screenshot shows the Siebel CRM 'Project Status' form. The form is divided into several sections: 'Project Status', 'Win/Loss Details', 'Submission Details', and 'CAD Exchange Details'. The 'Project Status' section includes fields for Effective Date, Expiration Date, Priced Date, Created Date, Created By, Status, and Need More Info. The 'Win/Loss Details' section includes Win/Loss, Accepted/Cancelled By, Activation Date, Activated By, and Reason for Loss. The 'Submission Details' section includes Quote Team, Submitted By, Requestor, Other, Contact Phone, and Contact Email. The 'CAD Exchange Details' section includes Exchange Date, Exchange Rate, Fund Flag, Margin to apply, and SFDC IWD Contact eMail. A dropdown menu is open on the right side of the form, showing various actions such as 'Undo Record [Ctrl+U]', 'New Record [Ctrl+Alt+N]', 'Copy Record [Ctrl+B]', 'Save Record [Ctrl+S]', 'New Query [Alt+Q]', 'Run Query [Alt+ENTER]', 'Refine Query [ALT+G]', 'About Record [Ctrl+Alt+K]', 'Record Count [Ctrl+Shift+3]', 'Create Bookmark...', 'Print Preview...', 'Print...', 'Import Quote' (highlighted with a red box), and 'Download Import Template'.

19. A pop-up screen will appear prompting you to browse and select the file that you want to import. Select the Excel template that you just modified and validated containing the line items that you want to add to the quote.

The screenshot shows the 'Import' pop-up screen. The screen has a title bar with 'Import' and a close button (X). The main content area has the heading 'Import' and a 'Browse...' button (highlighted with a red box) next to the text 'No file selected.' Below this, there is a paragraph of text: 'The process to import Quote Line items is time consuming. Click IMPORT to let the system process your request in the background. You will be notified via an email when the import has been performed. Click CANCEL to abort the import process. If you do not receive an email notification even after 1 hour, please contact the IR Residential services Siebel support team.' At the bottom right, there are two buttons: 'Import' and 'Cancel'.

20. Once you have selected the excel template that you want to upload, click the “Import” button. Siebel will begin importing line items. This process will run in the background and an email notification will be sent once the import is successfully completed.

Import

Import

Browse... 98Q220RHQ3846.xls

The process to import Quote Line items is time consuming. Click IMPORT to let the system process your request in the background. You will be notified via an email when the import has been performed. Click CANCEL to abort the import process.

If you do not receive an email notification even after 1 hour, please contact the IR Residential services Siebel support team.

Import Cancel

IMPORTANT: Do NOT click the refresh button or make any changes to the quote until you receive the email notification.

21. In Siebel, once the import is complete, you will be able to see the line items added the quote from the template. You will also be able to find the file that was imported under the “Attachment” tab in the quote.

Line Items	Notes	Attachments	Agreement	Quote Team	Supporting Information
Attachments					
<div> New File <div>New URL</div> </div>					
Attachment Name	Size (In Bytes)	Type	Modified	Update File	Comments
98Q220RHQ3...	72,727	xls	5/28/2020 08:15:20 AM	<input checked="" type="checkbox"/>	

Pricing Change Flag

IWD users now have the ability to identify if any prices were modified by the pricing team within the same version of the quote. Price changes can now be identified by a check (☒) in the box under the Price Change column within the quote.

- Initially, when the IWD user creates a quote and submits it to Pricing as “Pending Pricing Review”, the Price Change column is not checked (flagged).

[illegible]

2. Once the pricing team has reviewed the quote and submitted it as “Pending Sales Review”, any line items that had a change in price by the pricing team are now identifiable by the check (☒) in the Price Change column within the quote. If there was no price change that field will remain blank.

[illegible]

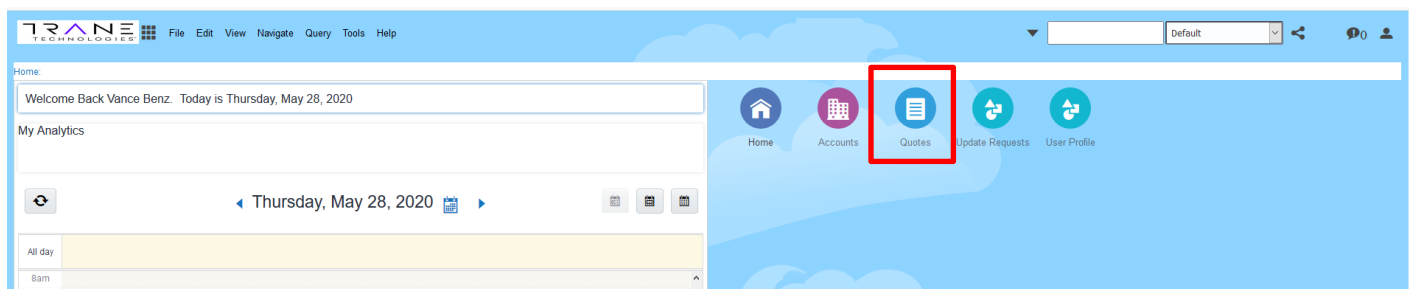
Agreements – Pre & Post Approval

There are two types of proposals/contracts that are generated depending on the status of your quote.

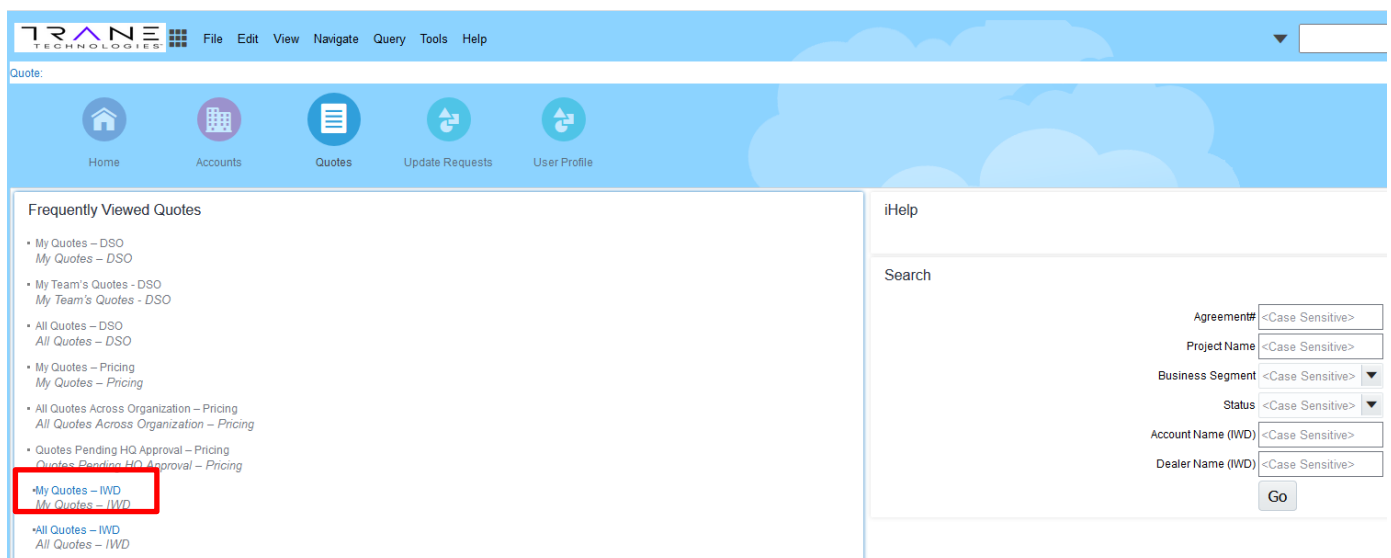
- When the quote is in pending status, the document generated will read “Pending Sell Price”, “Pending Buy Price” and “Pending Dist Margin %”
- Once a quote has been accepted, the proposal/contract will read “App. Sell Price”, “Approved Buy Price” and “Approved Dist Margin %”

Examples of both, as well as how to generate the two documents can be found below.

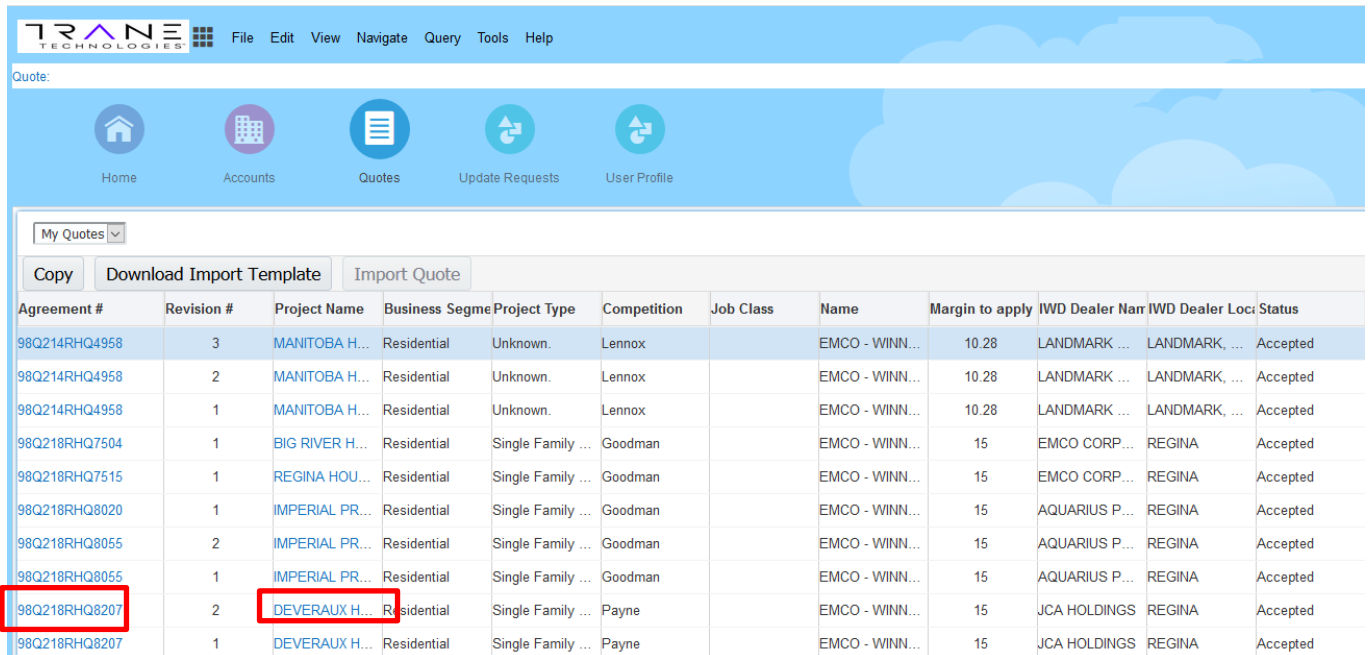
1. Log in to Siebel and click on the “Quotes” tab from the homepage.



2. On the Quotes homepage, click “My Quotes – IWD”.



- A list of your quotes will display. Double Click on the Agreement # or Project Name of the quote that you want to use to generate the proposal.



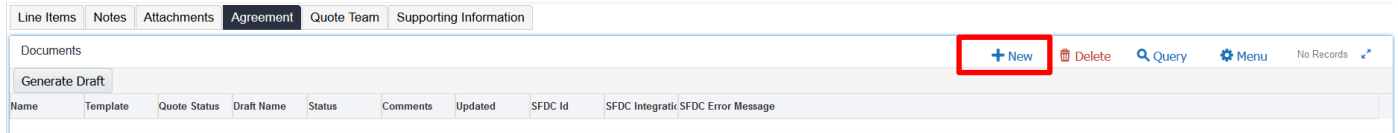
Agreement #	Revision #	Project Name	Business Segments	Project Type	Competition	Job Class	Name	Margin to apply	IWD Dealer Name	IWD Dealer Location	Status
98Q214RHQ4958	3	MANITOBA H...	Residential	Unknown	Lennox		EMCO - WINN...	10.28	LANDMARK ...	LANDMARK, ...	Accepted
98Q214RHQ4958	2	MANITOBA H...	Residential	Unknown	Lennox		EMCO - WINN...	10.28	LANDMARK ...	LANDMARK, ...	Accepted
98Q214RHQ4958	1	MANITOBA H...	Residential	Unknown	Lennox		EMCO - WINN...	10.28	LANDMARK ...	LANDMARK, ...	Accepted
98Q218RHQ7504	1	BIG RIVER H...	Residential	Single Family ...	Goodman		EMCO - WINN...	15	EMCO CORP...	REGINA	Accepted
98Q218RHQ7515	1	REGINA HOU...	Residential	Single Family ...	Goodman		EMCO - WINN...	15	EMCO CORP...	REGINA	Accepted
98Q218RHQ8020	1	IMPERIAL PR...	Residential	Single Family ...	Goodman		EMCO - WINN...	15	AQUARIUS P...	REGINA	Accepted
98Q218RHQ8055	2	IMPERIAL PR...	Residential	Single Family ...	Goodman		EMCO - WINN...	15	AQUARIUS P...	REGINA	Accepted
98Q218RHQ8055	1	IMPERIAL PR...	Residential	Single Family ...	Goodman		EMCO - WINN...	15	AQUARIUS P...	REGINA	Accepted
98Q218RHQ8207	2	DEVERAUX H...	Residential	Single Family ...	Payne		EMCO - WINN...	15	JCA HOLDINGS	REGINA	Accepted
98Q218RHQ8207	1	DEVERAUX H...	Residential	Single Family ...	Payne		EMCO - WINN...	15	JCA HOLDINGS	REGINA	Accepted

- Once you have opened the quote that you want to work with, click on the Agreement tab at the bottom of your screen.



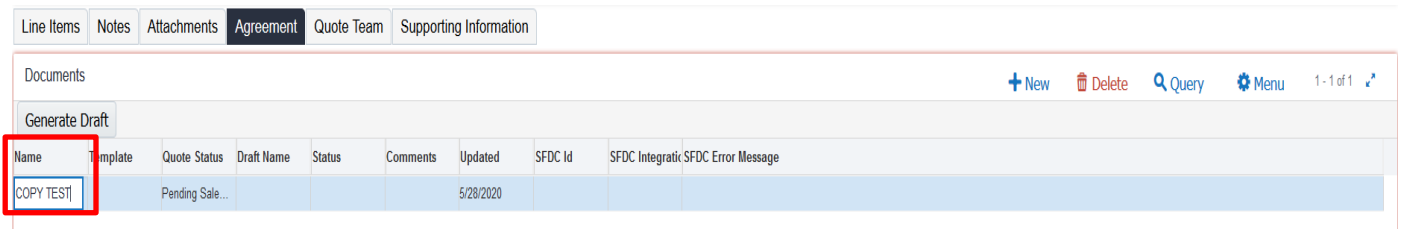
Name	Template	Quote Status	Draft Name	Status	Comments	Updated	SFDC Id	SFDC Integrati	SFDC Error Message

- Click the “New” button to create a new request to generate a draft of the Agreement for this quote.



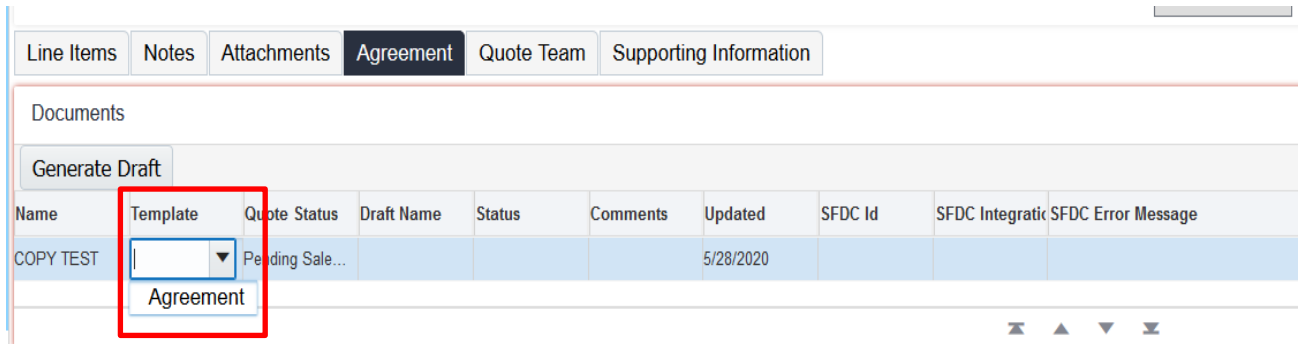
The screenshot shows the 'Agreement' tab selected in the top navigation bar. Below it, the 'Documents' section has a '+ New' button highlighted with a red box. Other buttons like 'Delete', 'Query', and 'Menu' are also visible. A table below shows columns for Name, Template, Quote Status, Draft Name, Status, Comments, Updated, SFDC Id, SFDC Integrat, and SFDC Error Message.

- First, fill in the name field. This is whatever name you want to call this document/draft.



The screenshot shows the 'Agreement' tab selected. The 'Name' field in the table is highlighted with a red box and contains the text 'COPY TEST!'. The 'Template' column shows 'Pending Sale...'. The 'Updated' column shows '5/28/2020'.

- Next, click the drop down menu in the Template column and select “Agreement”.



The screenshot shows the 'Agreement' tab selected. The 'Template' dropdown menu is open, and 'Agreement' is selected. The 'Name' field contains 'COPY TEST'. The 'Updated' column shows '5/28/2020'.

8. Next, click “Generate Draft”. The Status will read “In Queue” while the system is generating the document.

Line Items

Notes

Attachments

Agreement

Quote Team

Supporting Information

Documents

Generate Draft

Name	Template	Quote Status	Draft Name	Status	Comments	Updated	SFDC Id	SFDC Integratic
COPY TEST	Agreement	Pending Sale...		In Queue		5/28/2020		

9. The status will change from “In Queue” to “Generating” to “Completed”. You can click the refresh button in the upper left hand corner of your screen to refresh the system process and get an updated status while the system is generating your document.

10. When the system has finished generating the document and it is ready to view, the Status will read “Completed”.

Line Items

Notes

Attachments

Agreement

Quote Team

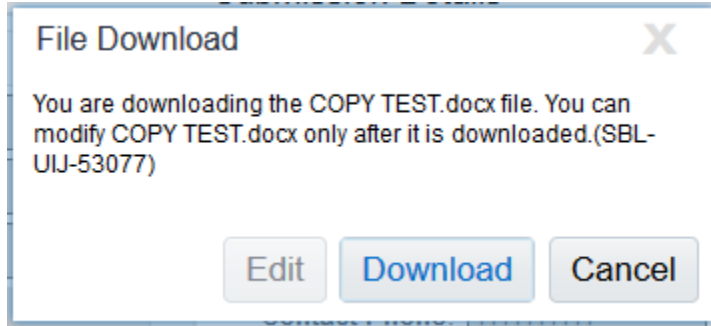
Supporting Information

Documents

Generate Draft

Name	Template	Quote Status	Draft Name	Status	Comments	Updated	SFDC Id	SFDC Integratic	SFDC Error Message
COPY TEST	Agreement	Pending Sale...	COPY TEST	Completed		5/28/2020	068L0000000...	Successful	

11. Click the hyperlink under draft name to download the document.



12. Below is an example of an Agreement generated before it has been accepted. Note that Sell Price, Buy Price and Dist Margin % are all "Pending".

HEADQUARTERS QUOTE FAX FORM

Distributor/Office: EMCO - 121302 - (T)
 Print Date: 5/28/2020 11:25:23 AM

Worksheet #: 98Q220RHQ3846
 Page: 1



Customer:	MCMECHANICAL	Worksheet Type:	Residential
Customer Location:	ESTERHAZY	Corresponding Worksheet:	
Job Name:	TEST	Effective Date:	4/8/2020
Job Location:	TEST LOCATION	Expiration Date:	12/31/2020
Requested By:	FEHBV	Price Date:	5/27/2020
Competition:	Goodman	Responsible for Competitive Pricing:	FEHBV
Contract Number:	98Q220RHQ3846	Project Type:	Single Family - NC
Job Type:		Fund Flag:	N
Job Class:			

Pricing Notes:

N/A

Pending Sell Price:	\$3,585.00	Standard Buy Price:	\$4,441.00
Requested Sell Price:	\$3,445.00	Pending Buy Price:	\$2,772.00
Requested Buy Price:	\$2,772.00	Total Rebate Amount:	\$1,669.00
Distributor Margin %:	22.68 %		

All Pricing in U.S. Dollars \$

Line #	Sub-Line#	Qty	Model	Pending Sell Price	Everyday Price	Pending Buy Price	Rebate Amt.	Pending Dist Margin %	Competitor Price
1		1	Sub Total	\$3,585.00	\$4,441.00	\$2,826.00	\$1,615.00	21.17 %	\$0.00
	1.1	1	4TTR4024L1000B	\$700.00	\$856.00	\$500.00	\$356.00	28.571429 %	

Prices are subject to change with sixty (60) day's written notice only if in connection with a publicly announced national price increase. Otherwise, prices are in effect until the expiration of the contract.

Signed: _____ Date: _____

Only an Approved Distributor Representative can sign this form.

The process is the same for generating Agreements for accepted quotes. However, the wording on the Agreement will be different once the quote has an accepted status.

- Follow the same steps as above to generate an Agreement for an Accepted quote. Go into the quote details and click the Agreement tab at the bottom of the screen.

Quotes + New Query Revise Pending

Distributor Quote Pricing Plan

IWD Info	Project Info	Project Status
Name: EMCO - WINNIF	Agreement #: 98Q220RHQ3846	Effective Date: 4/8/2020
Customer #: 30576	Revision: 3	Expiration Date: 12/31/2020
Site Location: TRANE_WINNIPEG	Project Name: TEST	Priced Date: 5/27/2020
Branch: EMCO - 121302 - (T	Location: TEST LOCATION	Created Date: 5/28/2020
Legacy Cost Center: 98Q2	Business Segment: Residential	Created By: Vance Benz
	Project Type: Single Family - N	Status: Accepted
	Job Type:	Need More Info:
	Quote Type:	
	Job Class:	
	Reason For Quote:	
	Expected Revenue: \$75,000.00	
	SFDC Opportunity Id: 006L000000DayzSIA	

Win/Loss Details	Submission Details
Win/Loss: Bid	Quote Team: FEHBV
Accepted/Cancelled By:	Submitted By: Vance Benz
Activation Date: 5/28/2020 10:24:01	Requestor: FEHBV
Activated By:	Other:
Reason for Loss:	Contact Phone: 1111111111
	Contact Email: rs-hvac-siebel-suppl
	Fund Flag: <input type="checkbox"/>
	Margin to apply: 18%
	SFDC IWD Contact eMail:

Detail Summary

Req.Dealer Sell Price: \$3,445.00	Req.Dealer Buy Price: \$2,772.00
App.Dealer Sell Price: \$3,585.00	App.Dealer Buy Price: \$2,772.00
Discount %: 43.21%	App.Dist Margin %: 22.68%

Line Items Notes Attachments **Agreement** Quote Team Supporting Information

- Click "New" and fill in the Name field.

Line Items Notes Attachments **Agreement** Quote Team Supporting Information

Documents + New Delete

Generate Draft

Name	Template	Quote Status	Draft Name	Status	Comments	Updated	SFDC Id	SFDC Integrat	SFDC Error Message
New Draft		Accepted				5/28/2020			
TEST	Agreement	Pending Sub...	TEST	Completed		5/28/2020	068L00000000...	Successful	

15. Next, click the drop down menu in the Template column.

Line Items Notes Attachments Agreement Quote Team Supporting Information										
Documents + New										
Generate Draft										
Name	Template	Quote Status	Draft Name	Status	Comments	Updated	SFDC Id	SFDC Integratic	SFDC Error Message	
New Draft	<div> <div></div> <div>Agreement</div> </div>	Accepted				5/28/2020				
TEST		Pending Sub...	TEST	Completed		5/28/2020	068L0000000...	Successful		

16. Once you have selected the template you want to use, click “Generate Draft”. The Status will read “In Queue” while the system is generating the document.

Line Items Notes Attachments Agreement Quote Team Supporting Information										
Documents + New										
Generate Draft										
Name	Template	Quote Status	Draft Name	Status	Comments	Updated	SFDC Id	SFDC Integratic	SFDC Error Message	
New Draft	Agreement	Accepted		In Queue		5/28/2020				
TEST	Agreement	Pending Sub...	TEST	Completed		5/28/2020	068L0000000...	Successful		

17. The status will change from “In Queue” to “Generating” to “Completed”. You can click the refresh button in the upper left hand corner of your screen to refresh the system process and get an updated status while the system is generating your document.

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https://rshvacsbuat.corp.global/siebel/app/htim/enu?SWECmd=GotoView&SWEView=IR

🔍 Siebel HTIM - RSSBPR...

🔍 Tableau Server

🔍 Siebel Testing

TRANE TECHNOLOGIES

File Edit View Navigate Query Tools Help

Quote:TEST | Quote:

🏠 Home

🏢 Accounts

📄 Quotes

🔄 Update Requests

👤 User Profile

18. When the system has finished generating the document and it is ready to view, the Status will read "Completed".

Line Items

Notes

Attachments

Agreement

Quote Team

Supporting Information

Documents

Generate Draft

Name	Template	Quote Status	Draft Name	Status	Comments	Updated	SFDC Id	SFDC Integratic
TEST	Agreement	Pending Sub...	TEST	Completed		5/28/2020	068L0000000...	Successful

19. Click the hyperlink under draft name to download the document.

File Download

You are downloading the TEST.docx file. You can modify TEST.docx only after it is downloaded.(SBL-UIJ-53077)

[Edit](#)
[Download](#)
[Cancel](#)

20. Below is an example of an Agreement generated after it has been accepted. Note that Sell Price, Buy Price and Dist Margin % are all "Approved"

HEADQUARTERS QUOTE FAX FORM

Distributor/Office: EMCO - 121302 - (T)
 Print Date: 5/28/2020 12:39:19 PM

Worksheet #: 98Q220RHQ3846
 Page: 1

Customer:	MCMECHANICAL	Worksheet Type:	Residential
Customer Location:	ESTERHAZY	Corresponding Worksheet:	
Job Name:	TEST	Effective Date:	4/8/2020
Job Location:	TEST LOCATION	Expiration Date:	12/31/2020
Requested By:	FEHBV	Price Date:	5/27/2020
Competition:	Goodman	Responsible for Competitive Pricing:	FEHBV
Contract Number:	98Q220RHQ3846	Project Type:	Single Family - NC
Job Type:		Fund Flag:	N
Job Class:			

Pricing Notes: N/A

Pending Sell Price:	\$3,585.00	Standard Buy Price:	\$4,441.00
Requested Sell Price:	\$3,445.00	Pending Buy Price:	\$2,772.00
Requested Buy Price:	\$2,772.00	Total Rebate Amount:	\$1,669.00
Distributor Margin %:	22.68 %		

All Pricing in U.S. Dollars \$

Line #	Sub-Line#	Qty	Model	Pending Sell Price	Everyday Price	Pending Buy Price	Rebate Amt.	Pending Dist Margin %	Competitor Price
	1.1	1	4TTR4024L1000B	\$700.00	\$856.00	\$500.00	\$356.00	28.571429 %	

Prices are subject to change with sixty (60) day's written notice only if in connection with a publicly announced national price increase. Otherwise, prices are in effect until the expiration of the contract.

Signed: _____ Date: _____

Only an Approved Distributor Representative can sign this form.

Note to Distributor: Do not sign above until this form represents the final pricing with your customer, and you are ready to ship product to your customer under the terms of this special authorized price.

Disclaimer: This document is proprietary and confidential. No part of this document may be disclosed in any manner to a third party without the prior written consent of Trane U.S. Inc.

For Support:

For questions on how to use the application, please contact Bryan Harper (bryan.harper@tranetechnologies.com), or Wesley Blalock (Wesley.Blalock@tranetechnologies.com).

For technical support, please call IR helpdesk **1-800-872-6381** and create a ticket. Please provide the details below so your ticket is routed to the correct Siebel support team.

- Provide the Queue Name as: **RS-HVAC-SIEBEL (remember to mention this to the helpdesk person)**
- Issue Description (Please provide Quote #, screenshot or error message, Customer # etc.)
- Your Siebel Id, Full Name, Contact Phone # and email or if you are raising a ticket on behalf of someone, then provide the details for that person