Siebel Phase 2a

IWD Training Guide

ORACLE
Siebel HTIM - RSSBPRD2 8.1
User ID:
Password:
Remember my User ID
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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

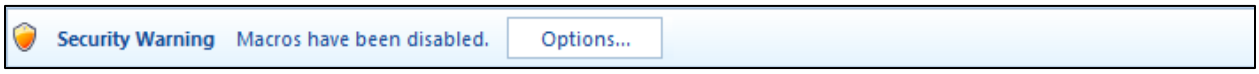
Before starting the process of working with the import/export functionality in Siebel, make sure you have enabled macros in Microsoft Excel. This is required for the import/export template to function properly in Excel.

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.

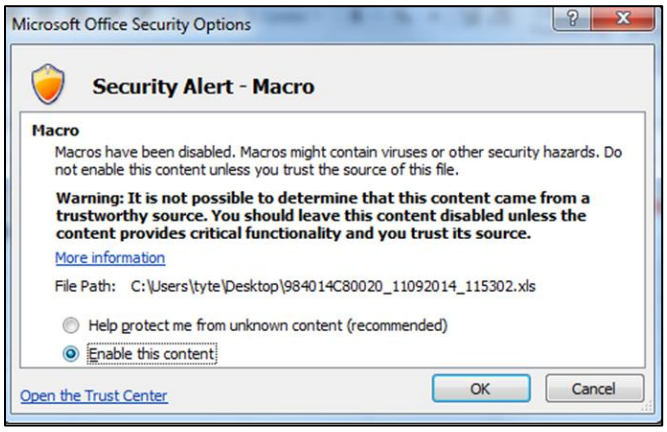
Excel 2007

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

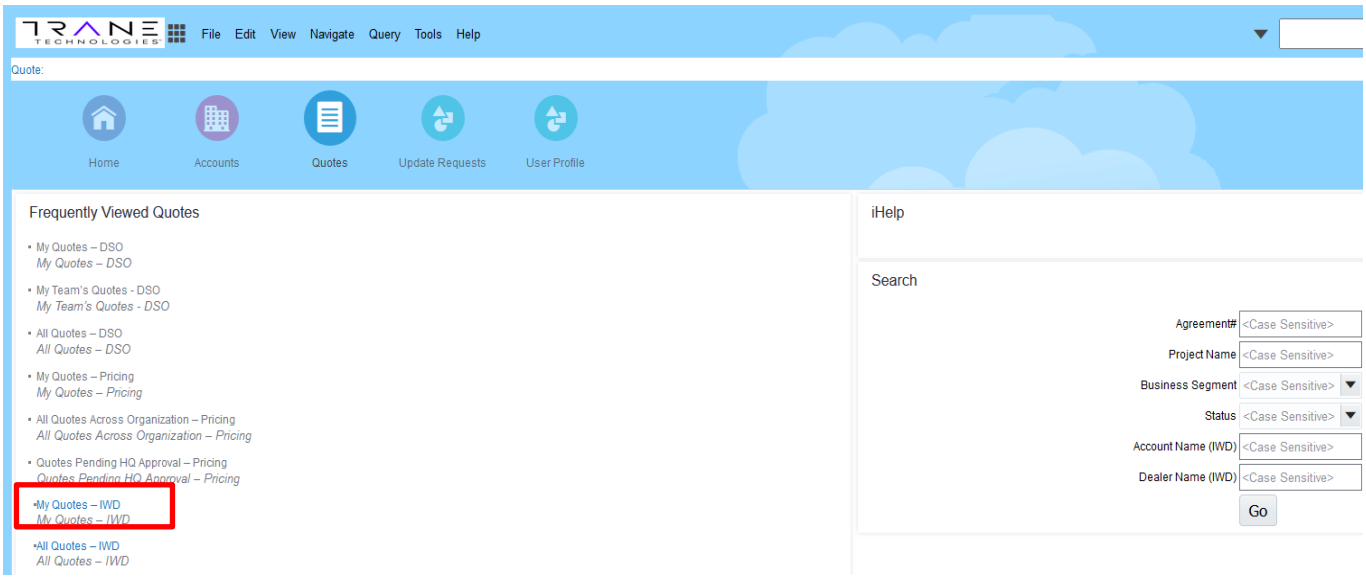
When you open the import template in Excel, you will see the message above. Click "Enable Content" to allow the macro to run.

To Begin

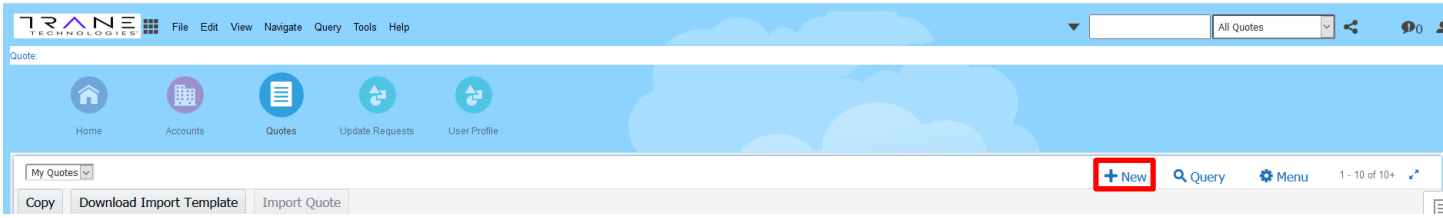
1. The import/export functionality only imports line items so you will need to create the quote header before you execute the import/export process.

   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.

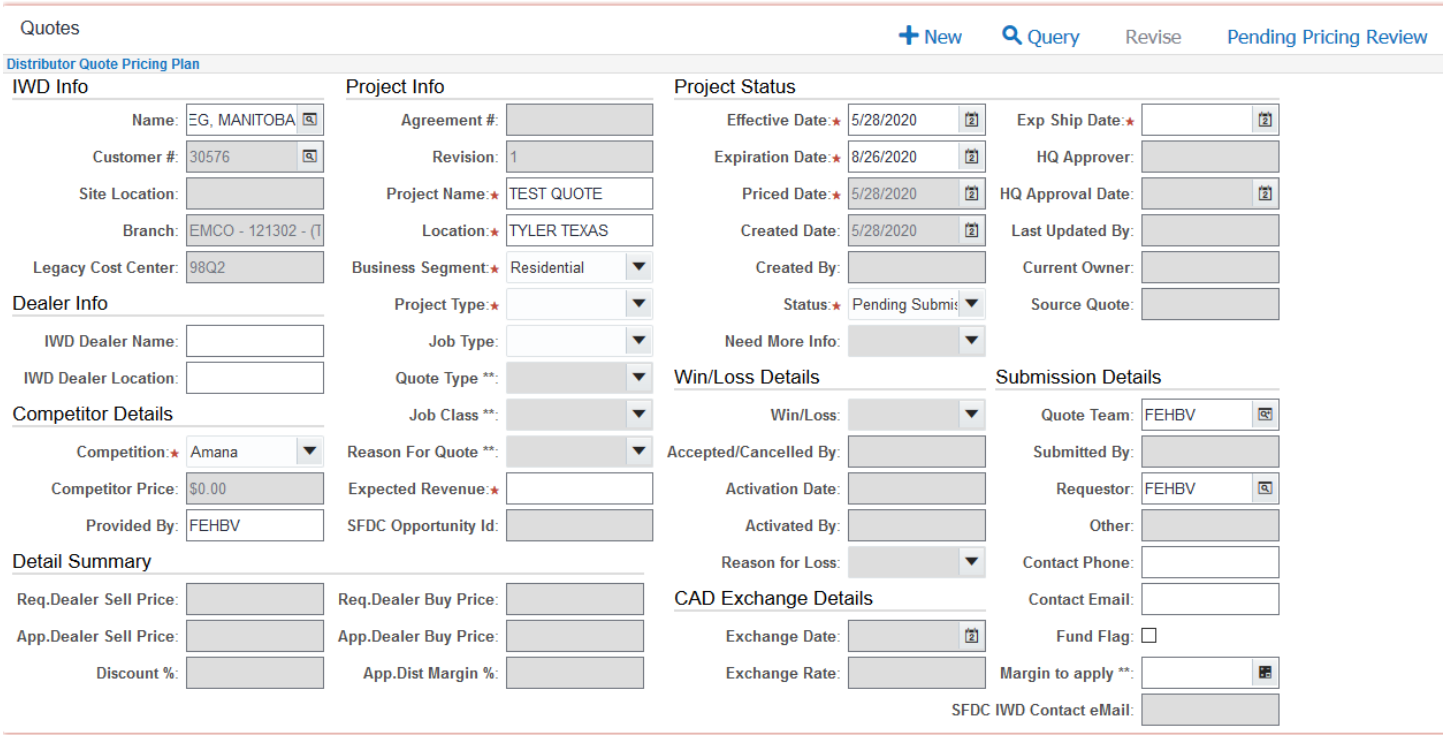
   - Log in and click on the Quotes Tab. In the Quotes home screen, click on My Quotes – IWD and begin the process of creating a new quote


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#
Project Name
Business Segment
Status
Account Name (IWD)
Dealer Name (IWD)
<Case Sensitive>
Go

2. Click “New” to start a new quote.



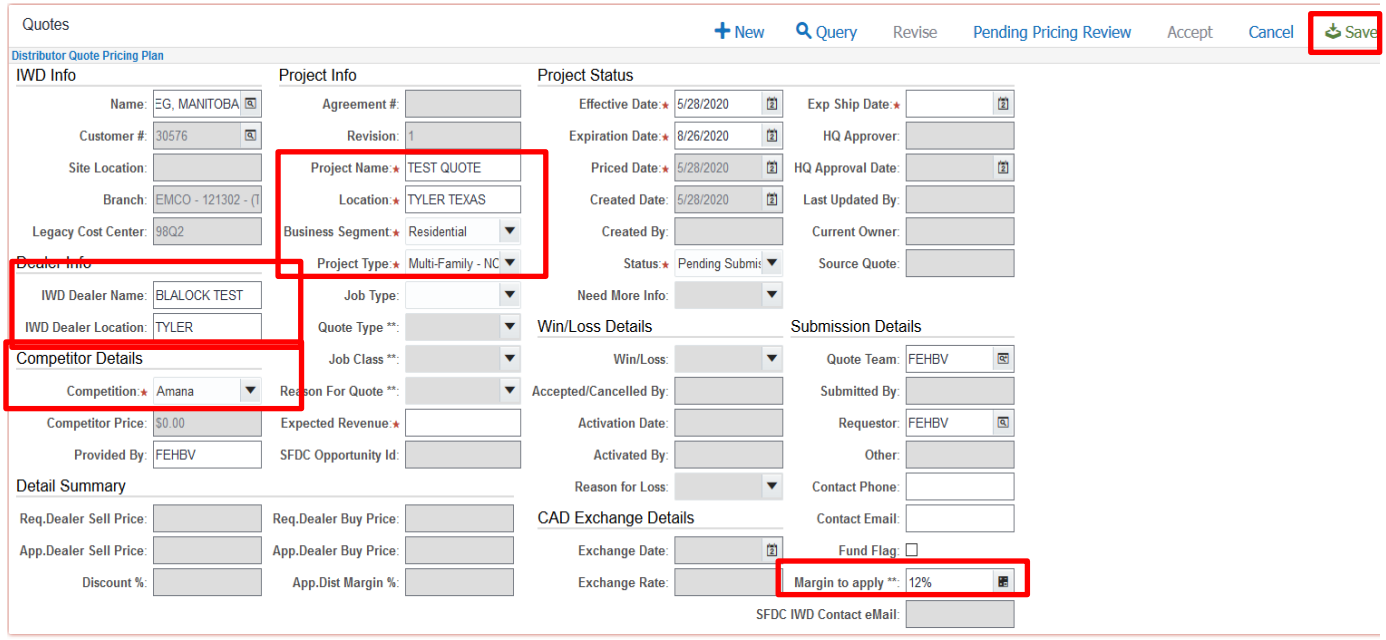
3. Begin creating your quote by entering the header information either in the list view or form view as seen below.



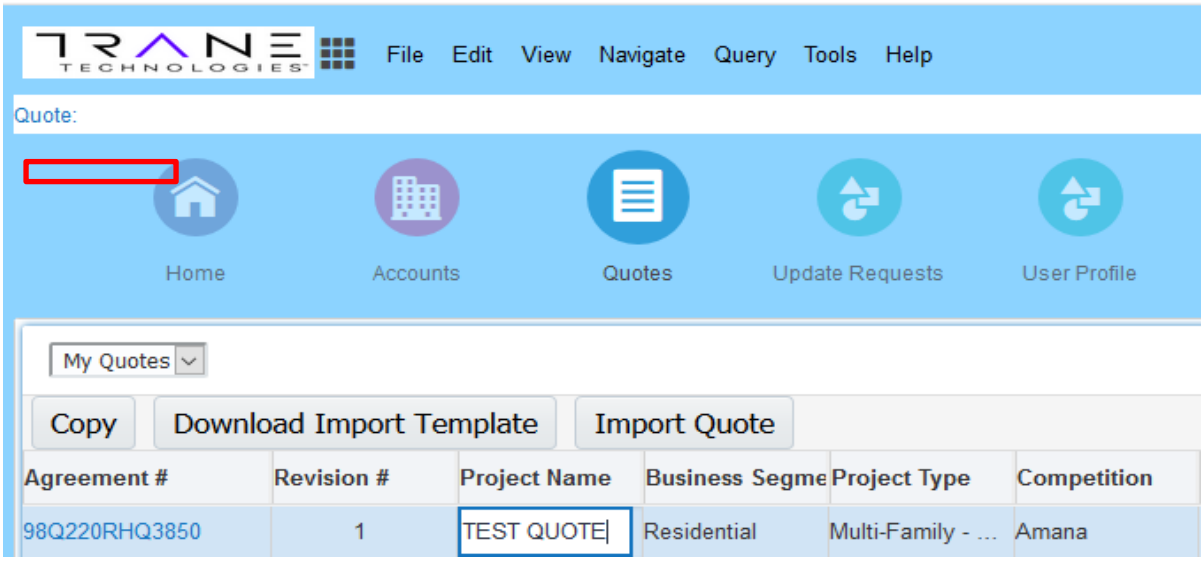
4. The required fields when creating the header for a Residential quote are:
   - Dealer Info
     - IWD Dealer Name
     - IWD Dealer Location
   - Competitor Info
     - Competition – click arrow for drop down menu and choose competitor
   - Project Info
     - Project name
     - Location
     - Business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

- Project Type
- Submission Details
  - Margin to Apply

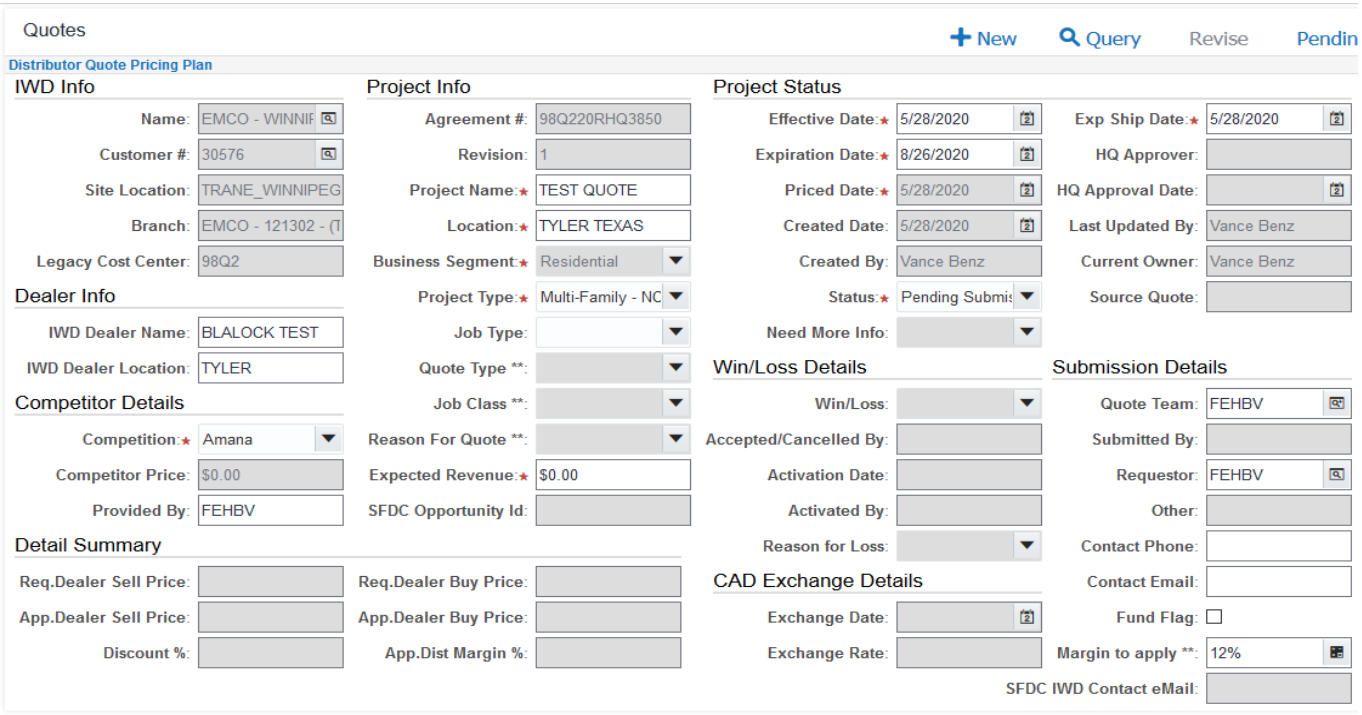
Click “Save” to create the quote.



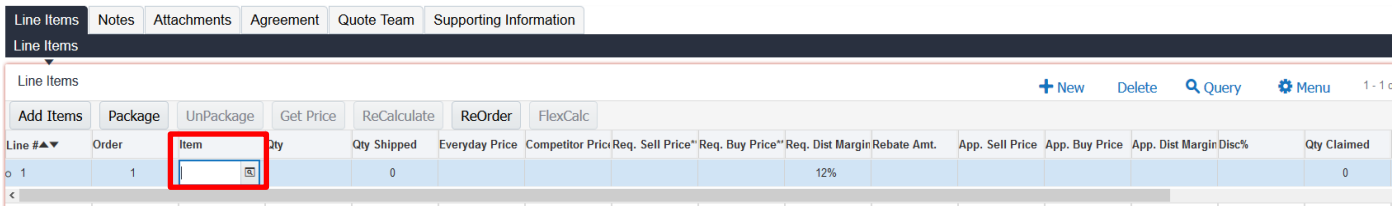
5. Once you have clicked save, Siebel will assign a quote number to the header information that you created. To view the quote details and manually add the first item on the quote, scroll up to the list view and click on the Agreement Number of the quote you just created.



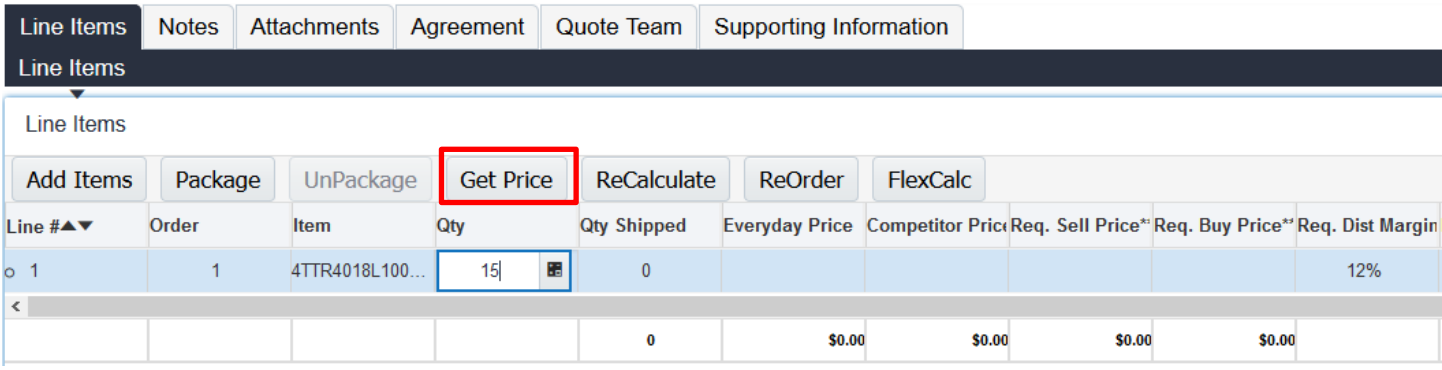
Quote Details



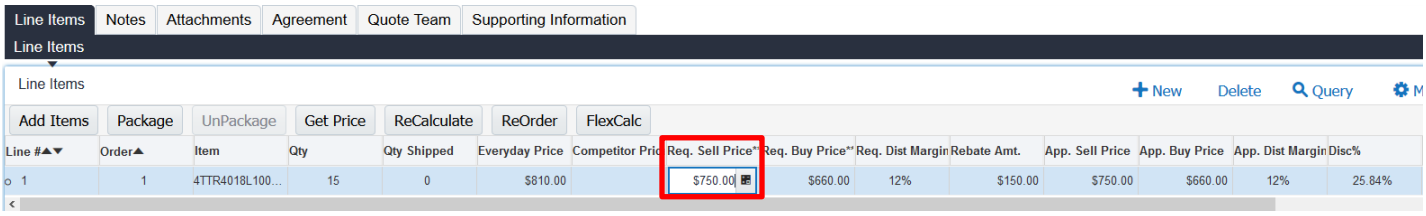
6. Click on “Add Items” to query for the model that you want to add or simply click “New” in the line items section and fill in the required information.
   - Item #
   - Quantity



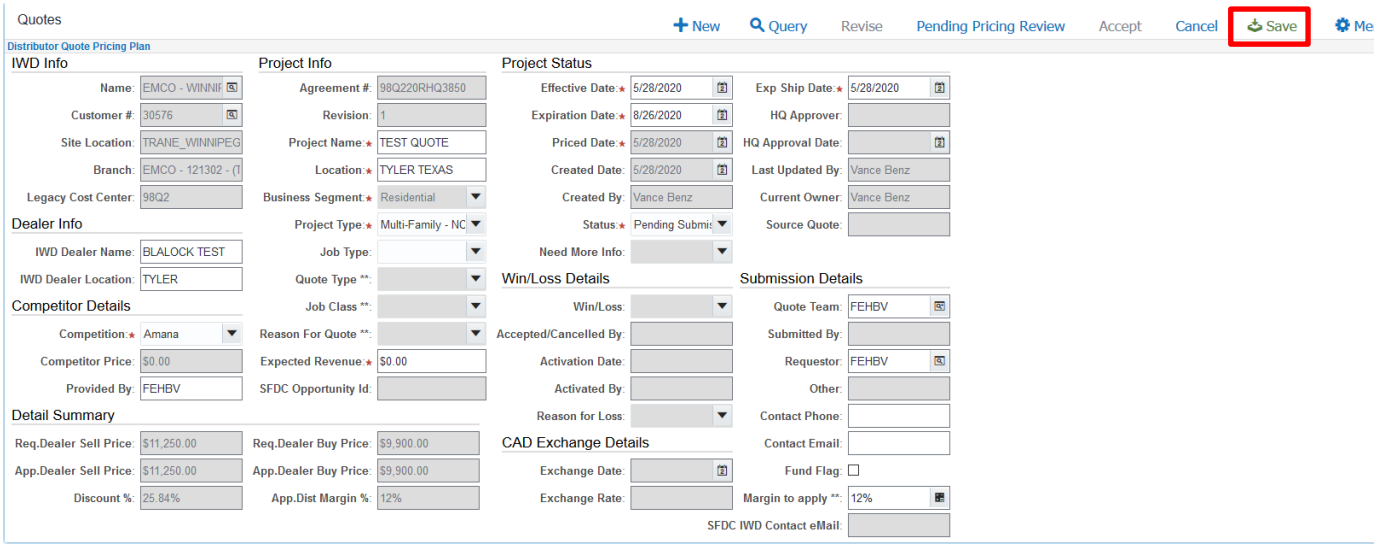
7. Once you have entered the item number and quantity, click “Get Price”. A pop up will display that says “Retrieving Pricing Information” while the system pulls pricing from R12.



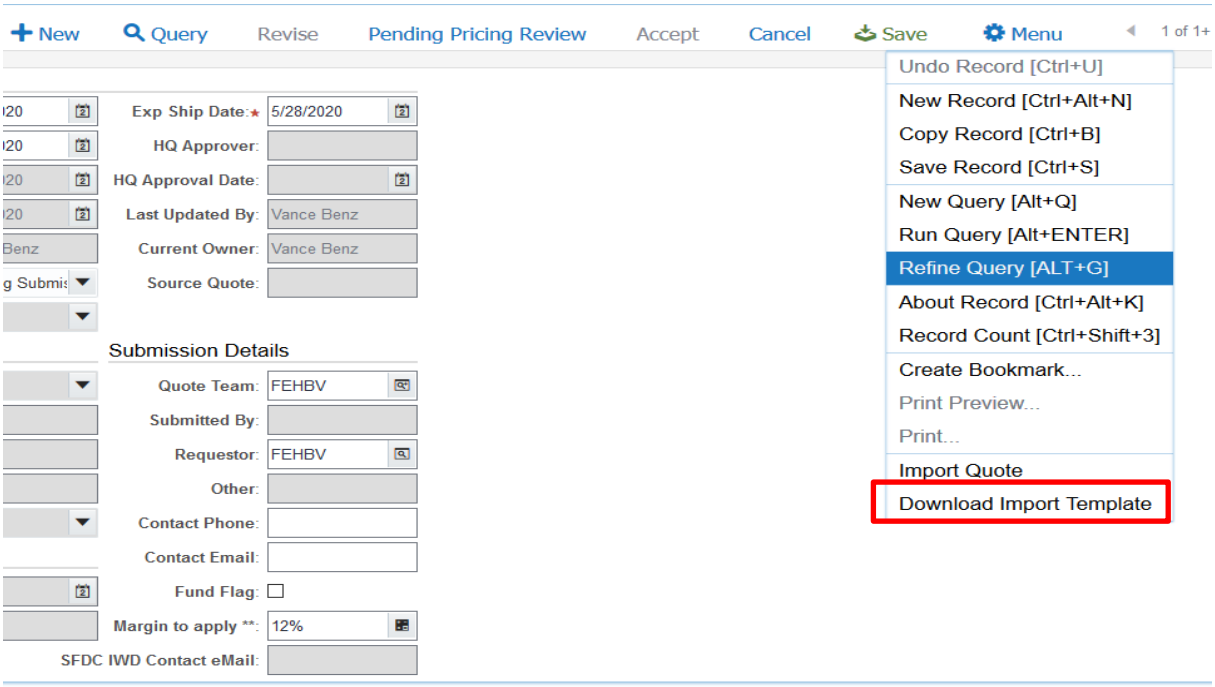
8. Once pricing has been loaded, enter your Requested Sell Price. This will automatically populate numbers in the other required fields based on the amount you entered for your Margin to Apply.



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.

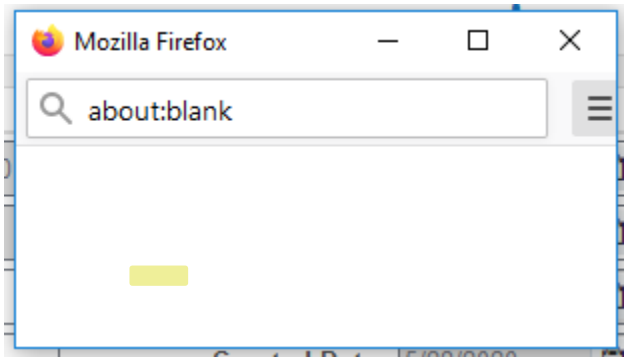


10. There are two ways to download/export the excel template:
    a. Click the drop down “Menu” button in the line details portion of the quote and select “Download Import Template”



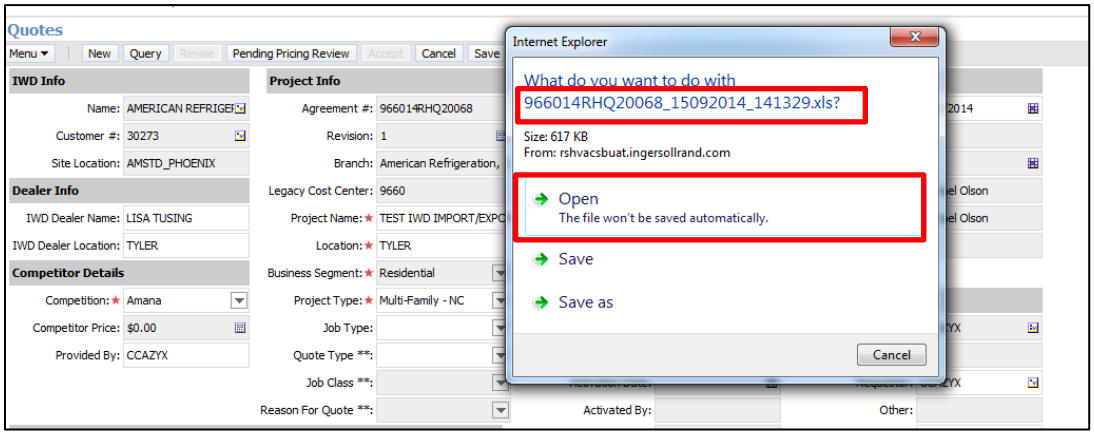
b. Click on the “Download Import Template” button

- A pop-up screen will appear

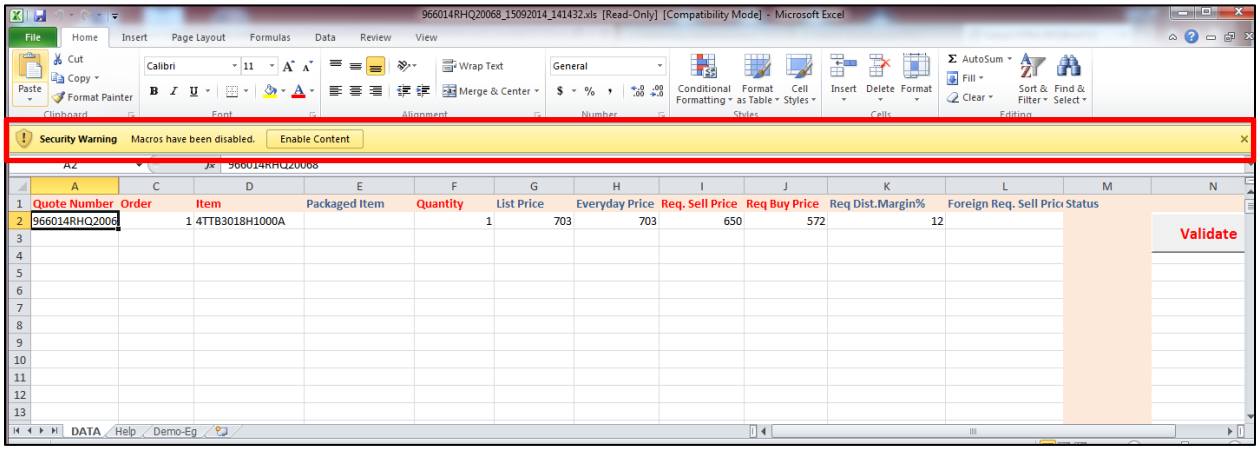


IMPORTANT: Always download a new template before starting the import process. Using an old template will cause errors.

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.

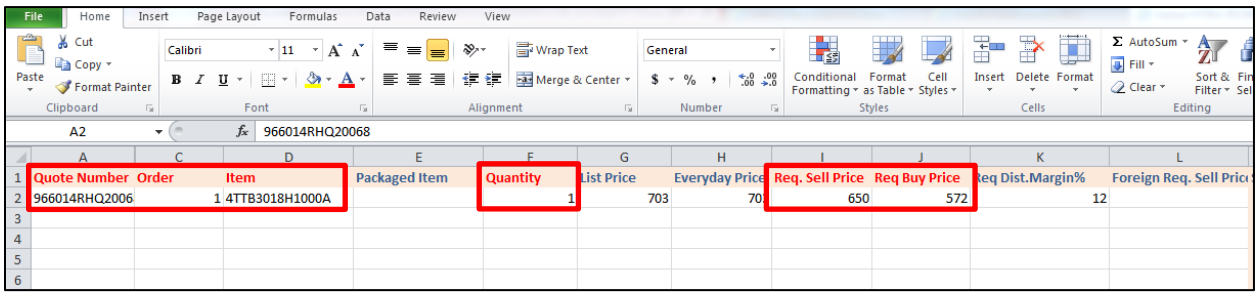


IMPORTANT: It is extremely important to emphasize that you only input information needed to import line items into the quote. Changing information such as moving column order, changing header names of columns or modifying the core information that makes up the template will cause it not to function properly. 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.**

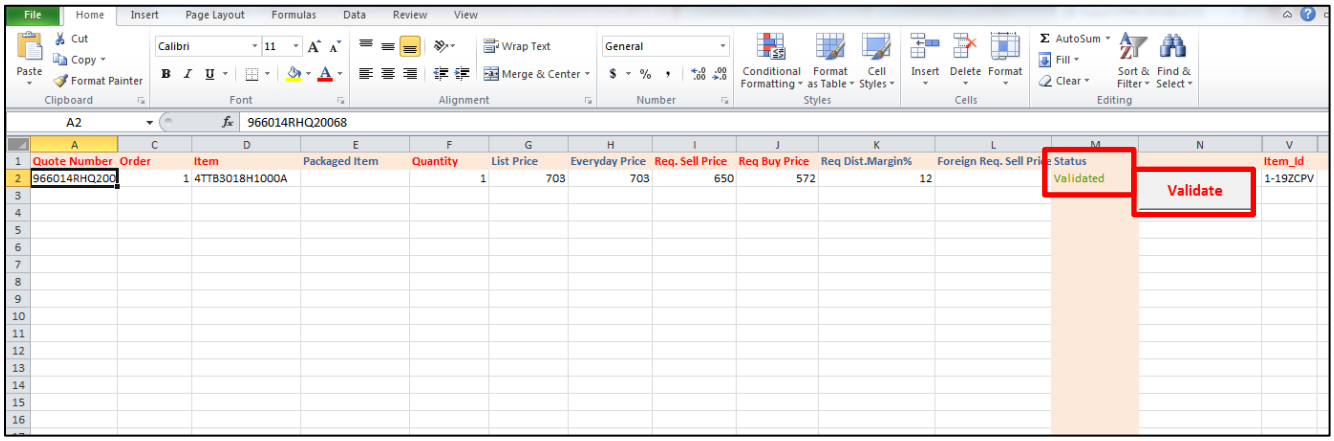
    - Quote Number – you can only import line items for one quote per template. Column A (Quote Number) should have the same quote number listed for each line where models are present
    - Order – numbers in this column designate the order in which the line item will appear on the quote. **Numbers listed 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**



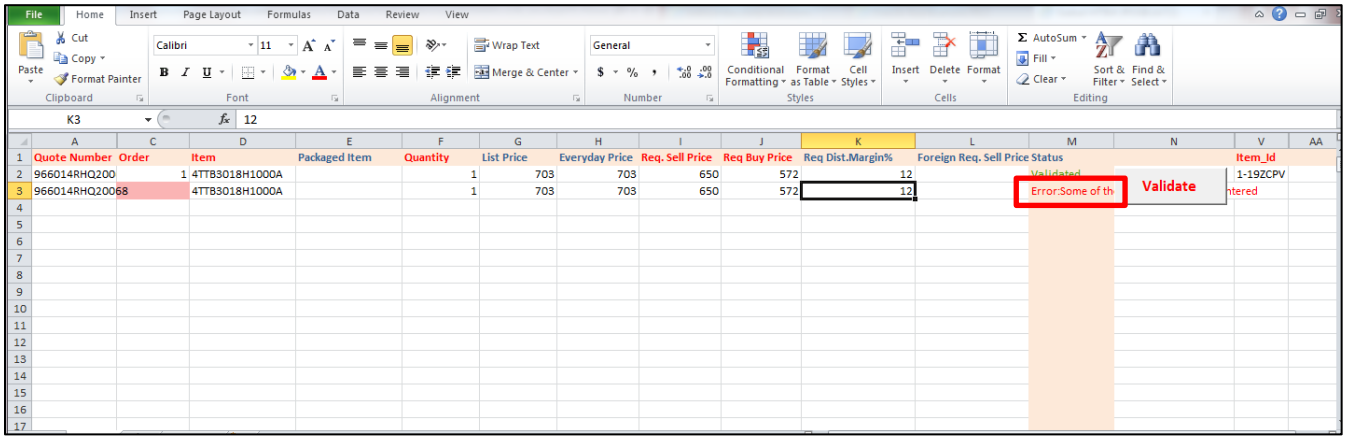
14. Once all required fields are completed, validate the information.

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

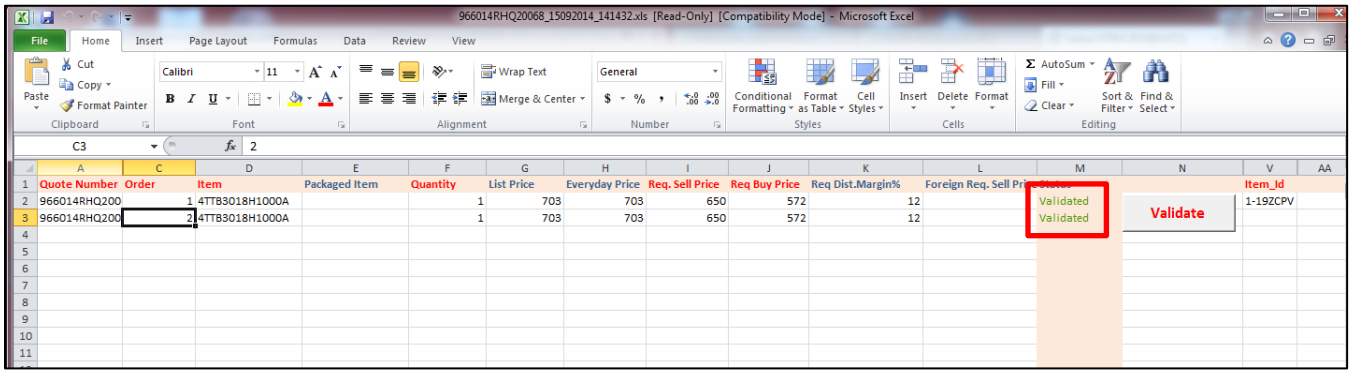
IMPORTANT: The Req Dist.Margin% field determines Req Buy Price values. IF the Req. Dist.Margin% field contains a value, it will auto populate or replace the Req Buy Price field with the calculated Req Dist.Margin % when you click the “Validate” button. If the Req Dist.Margin% field is blank and the Req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



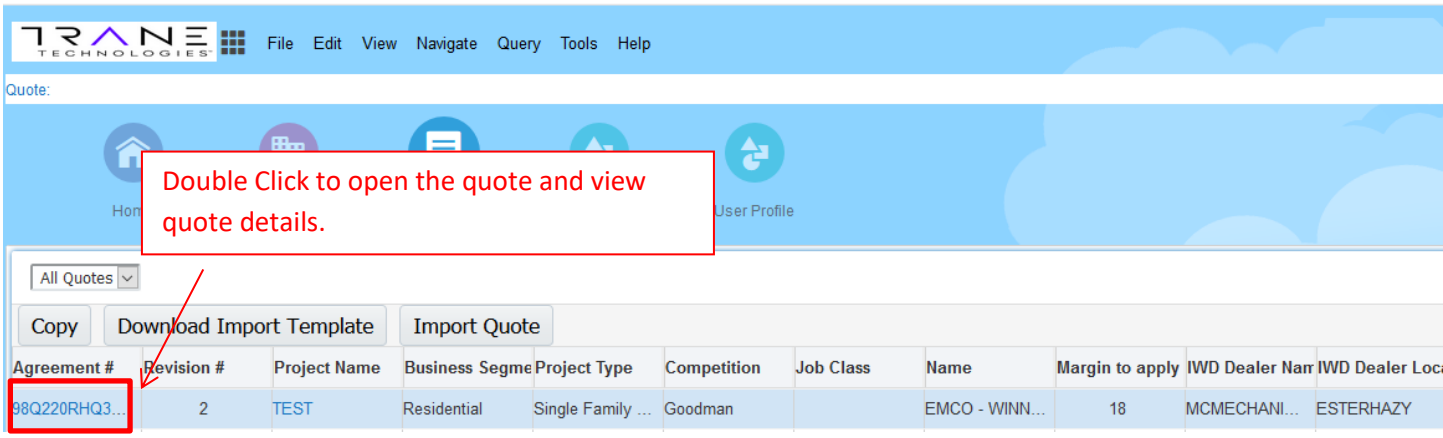
15. When the validation is NOT successful, i.e. there is an issue against a row/line item in Excel, then the system will display the status (Column T) in Red text so that users can easily identify erroneous lines. The text in the status field will start with the word “Error” followed by a message regarding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



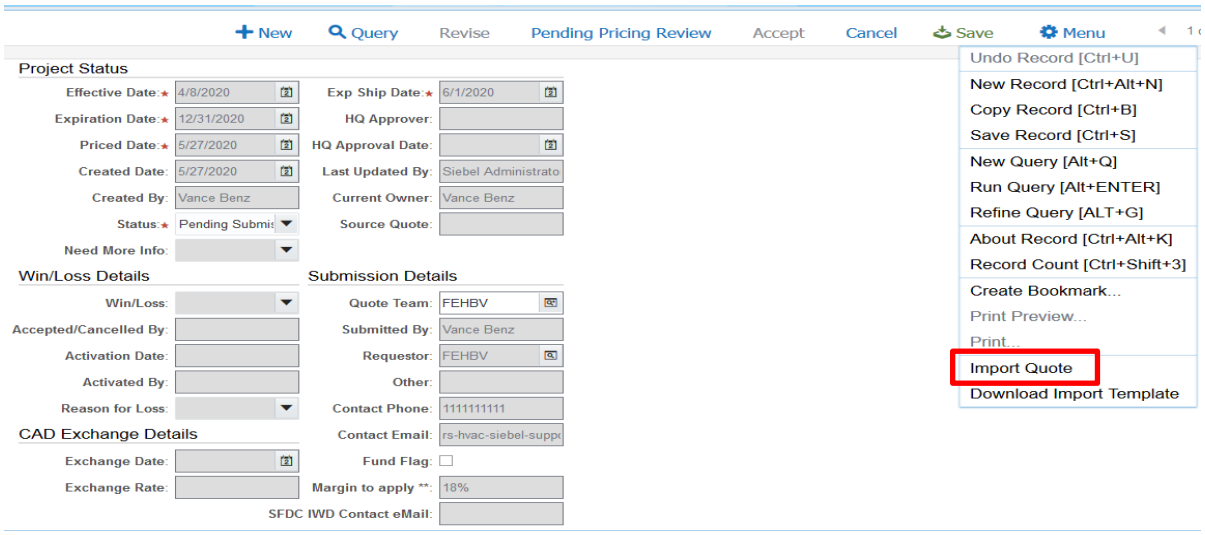
16. Once all lines in excel have been successfully validated, save the excel template. You are now ready to begin the import process in Siebel.



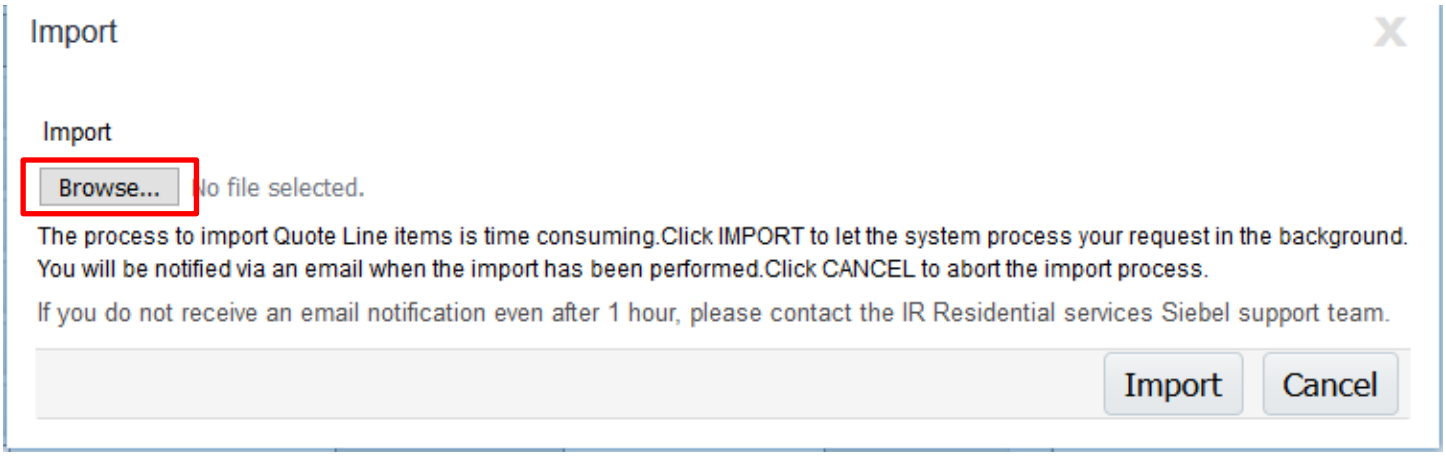
17. Go into Siebel and pull up the quote you created to import line items. *Make sure you have opened the quote and the quote details are visible in the bottom portion of your screen.*



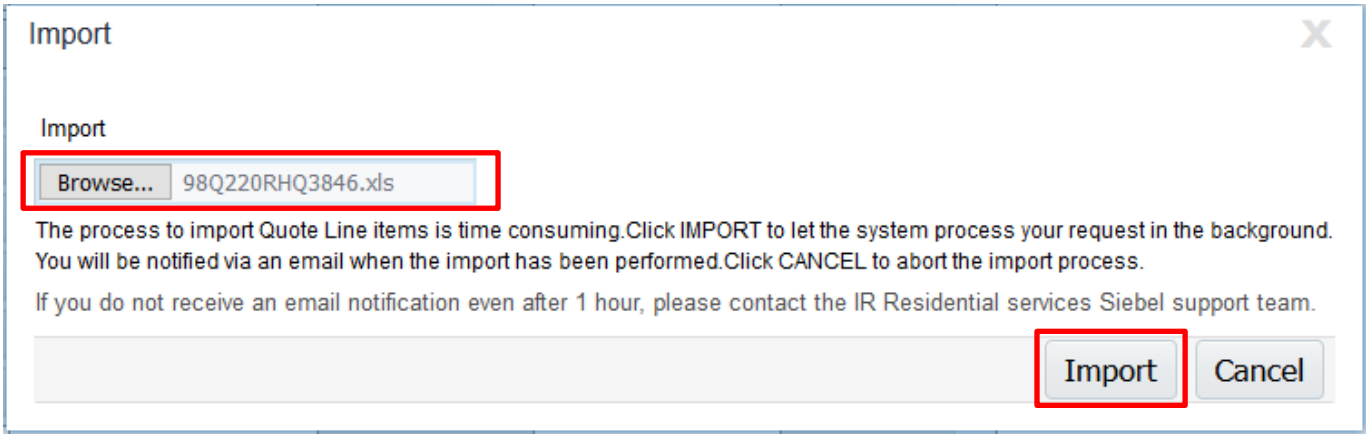
18. In the lower portion of the screen
    a. Click the “Menu” button at the top of the screen, and select “Import Quote” from the dropdown box



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.

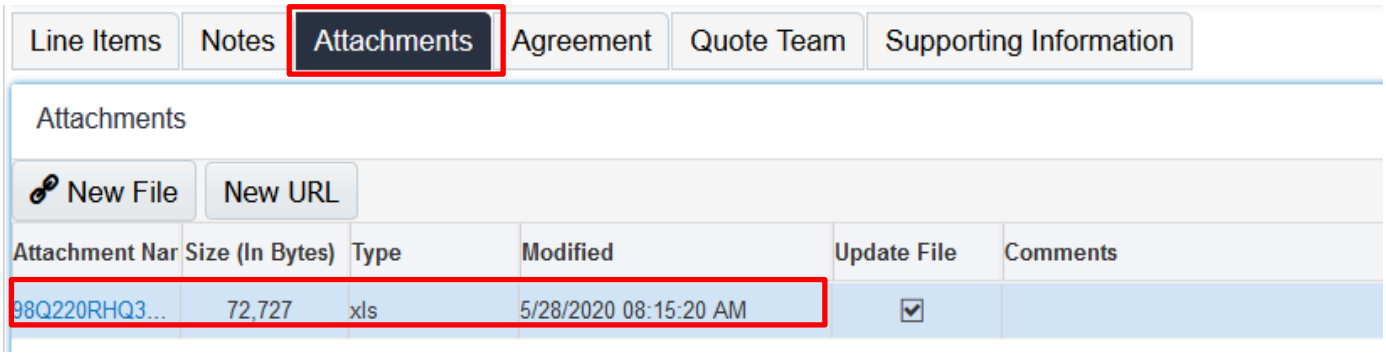


20. Once you have selected the excel template that you want to upload, click the “Import” button. Siebel will begin importing line items. This process will run in the background and an email notification will be sent once the import is successfully completed.



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

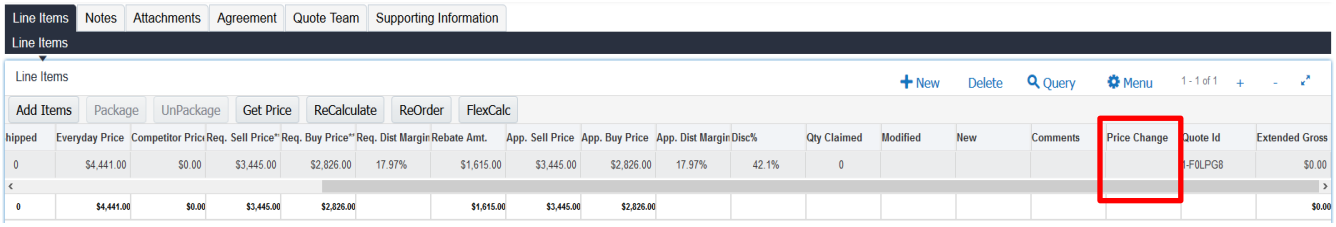
21. In Siebel, once the import is complete, you will be able to see the line items added the quote from the template. You will also be able to find the file that was imported under the “Attachment” tab in the quote.



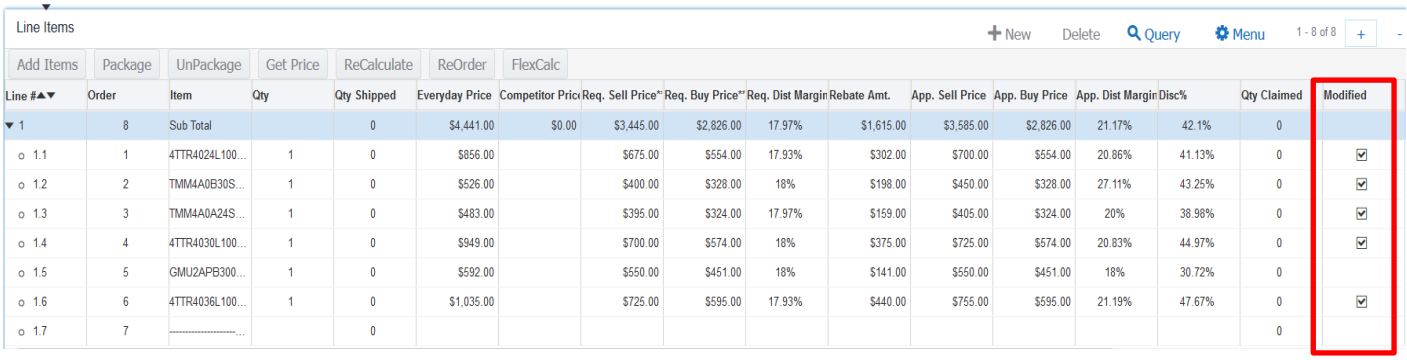
Pricing Change Flag

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.

1. 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).



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.



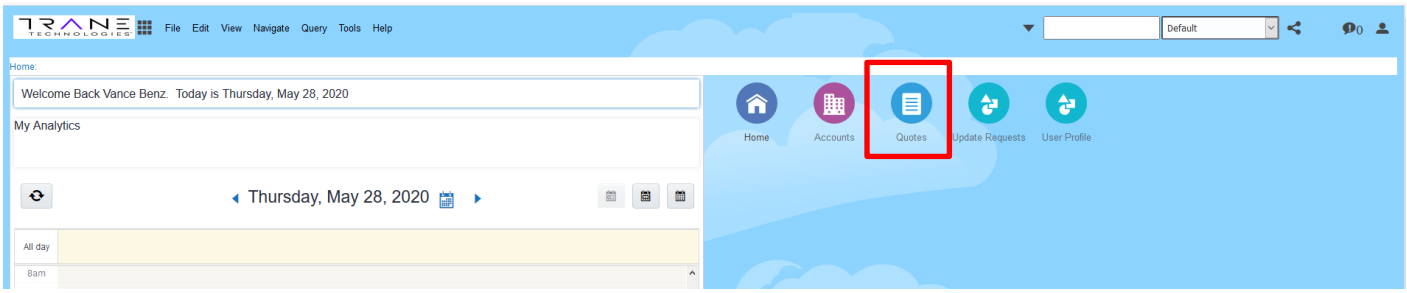
Agreements – Pre & Post Approval

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

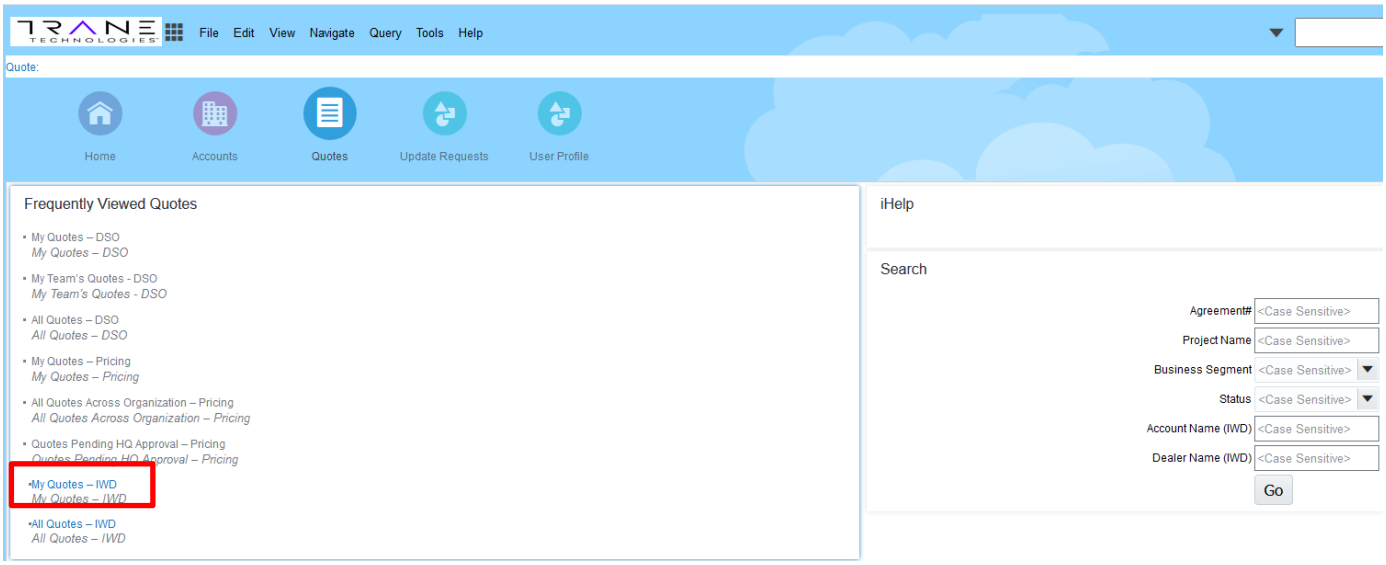
- When the quote is in pending status, the document generated will read “Pending Sell Price”, “Pending Buy Price” and “Pending Dist Margin %”
- Once a quote has been accepted, the proposal/contract will read “App. Sell Price”, “Approved Buy Price” and “Approved Dist Margin %”

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

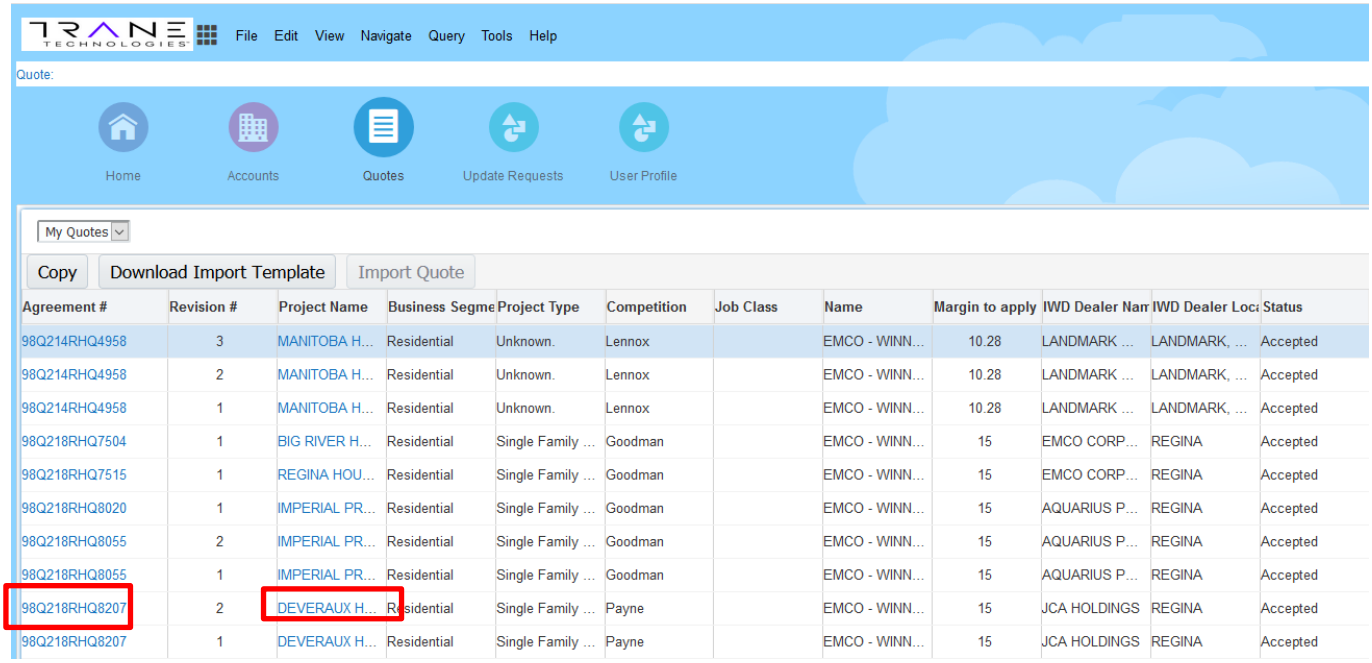
1. Log in to Siebel and click on the “Quotes” tab from the homepage.



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



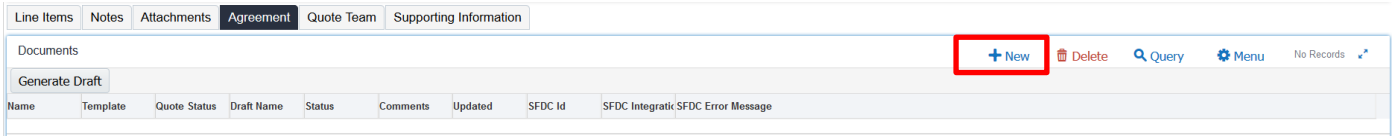
3. A list of your quotes will display. Double Click on the Agreement # or Project Name of the quote that you want to use to generate the proposal.



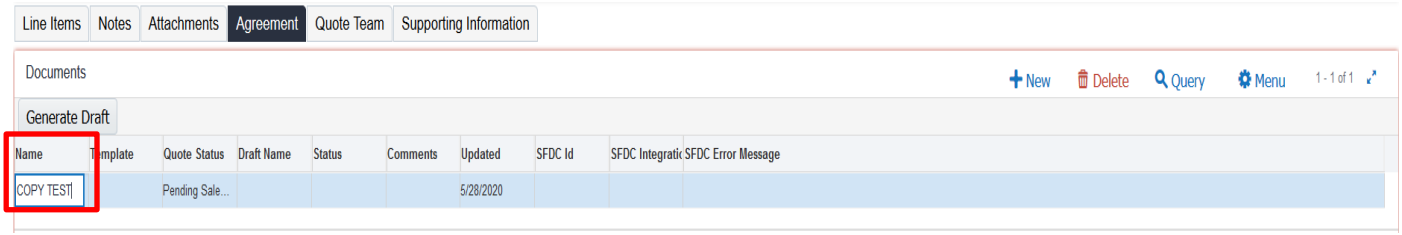
Agreement #	Revision #	Project Name	Business Segme	Project Type	Competition	Job Class	Name	Margin to apply	IWD Dealer Nam	IWD Dealer Loc	Status
98Q214RHQ4958	3	MANITOBA H...	Residential	Unknown.	Lennox		EMCO - WINN...	10.28	LANDMARK ...	LANDMARK, ...	Accepted
98Q214RHQ4958	2	MANITOBA H...	Residential	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

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

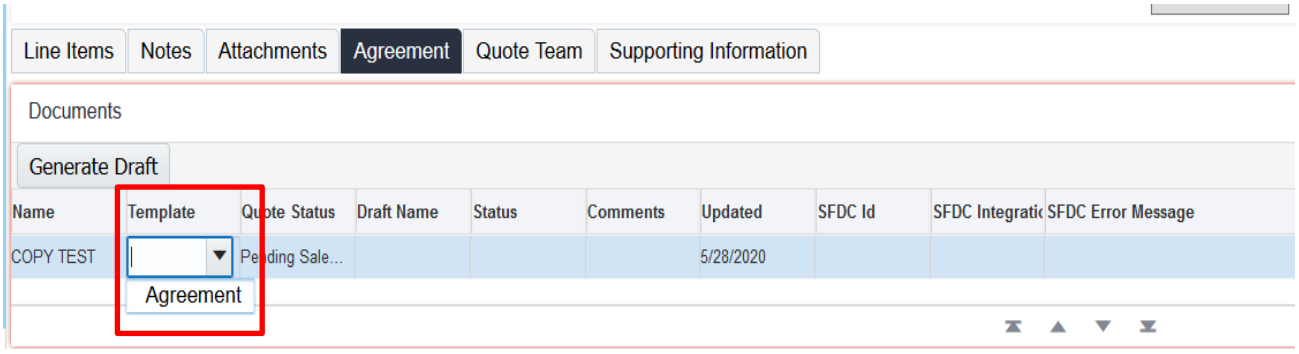
5. Click the “New” button to create a new request to generate a draft of the Agreement for this quote.



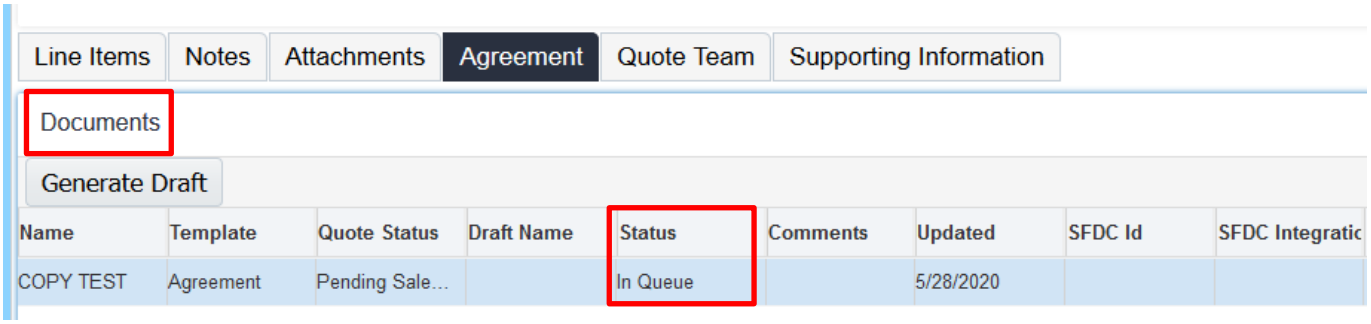
6. First, fill in the name field. This is whatever name you want to call this document/draft.



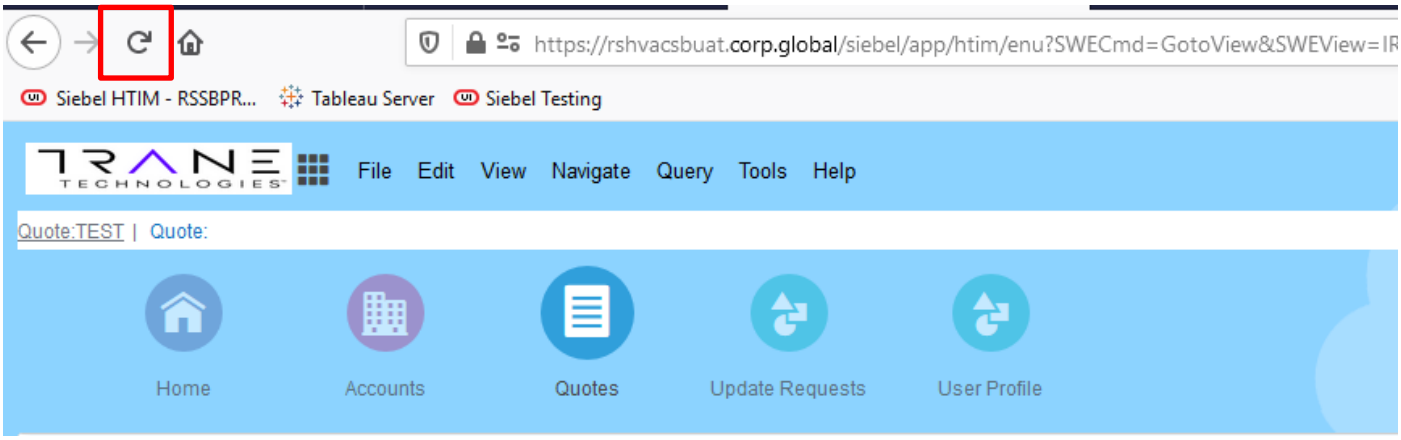
7. Next, click the drop down menu in the Template column and select “Agreement”.



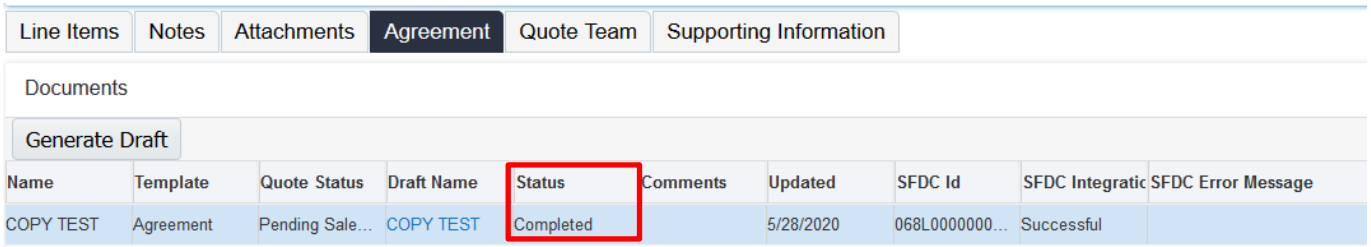
8. Next, click “Generate Draft”. The Status will read “In Queue” while the system is generating the document.



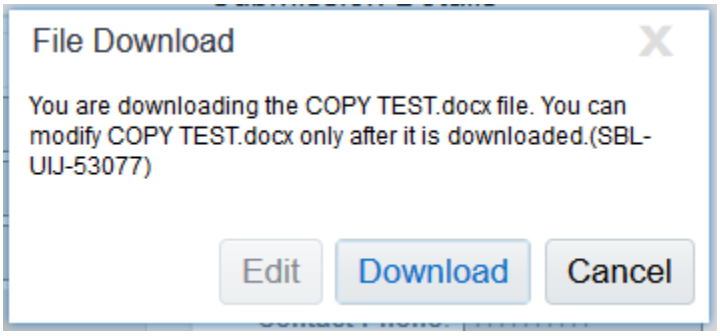
9. The status will change from “In Queue” to “Generating” to “Completed”. You can click the refresh button in the upper left hand corner of your screen to refresh the system process and get an updated status while the system is generating your document.



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



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)	Worksheet #:	98Q220RHQ3846
Print Date :	5/28/2020 11:25:23 AM	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 %	

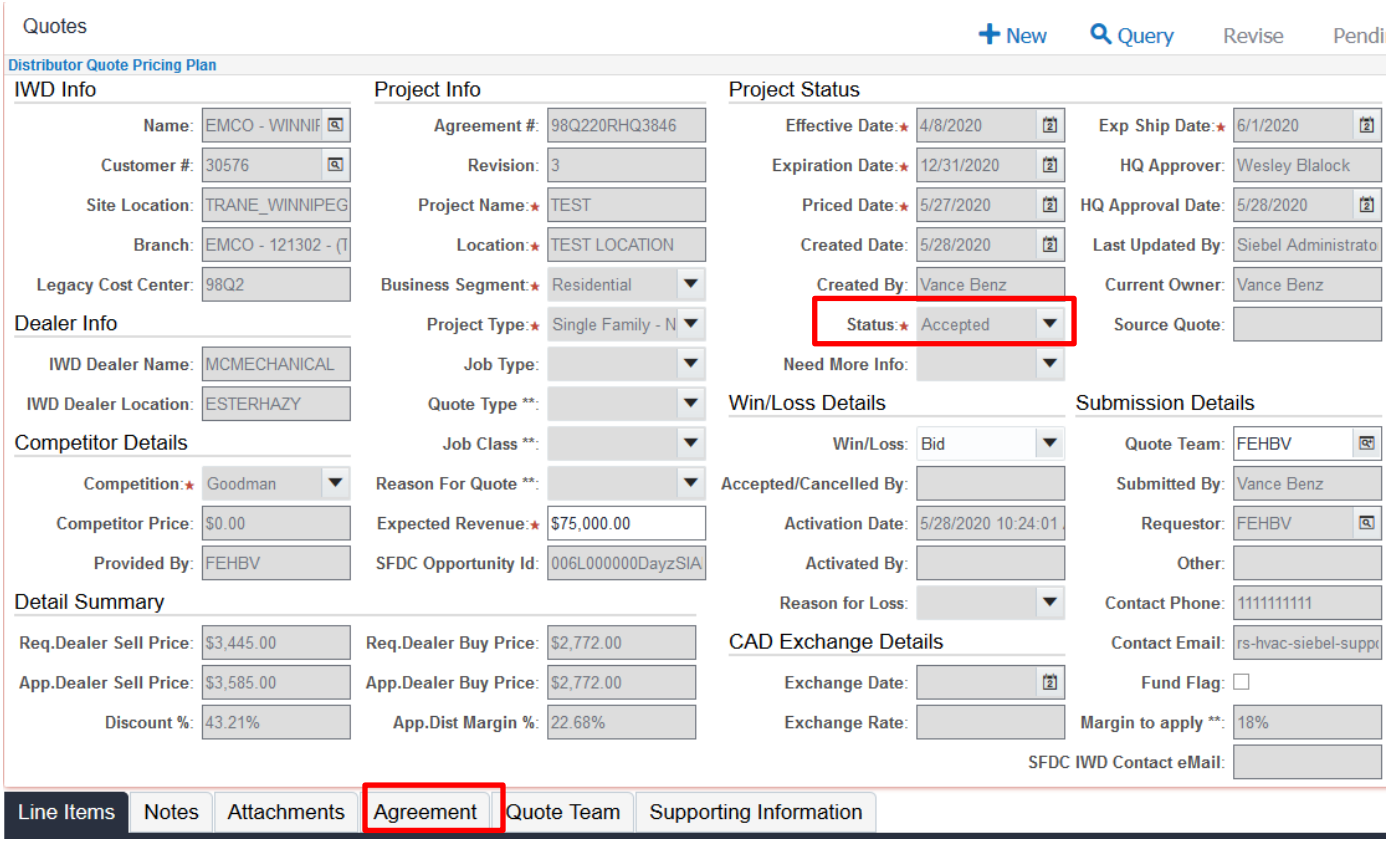
Prices are subject to change with sixty (60) day's written notice only if in connection with a publicly announced national price increase. Otherwise, prices are in effect until the expiration of the contract.

Signed:_____ Date: _____

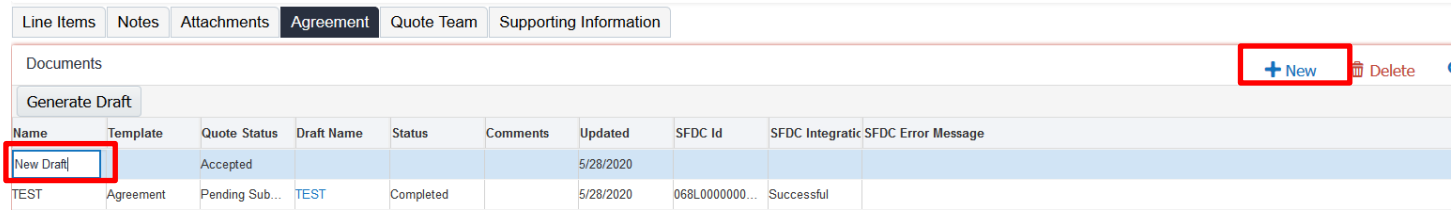
Only an Approved Distributor Representative can sign this form.

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.

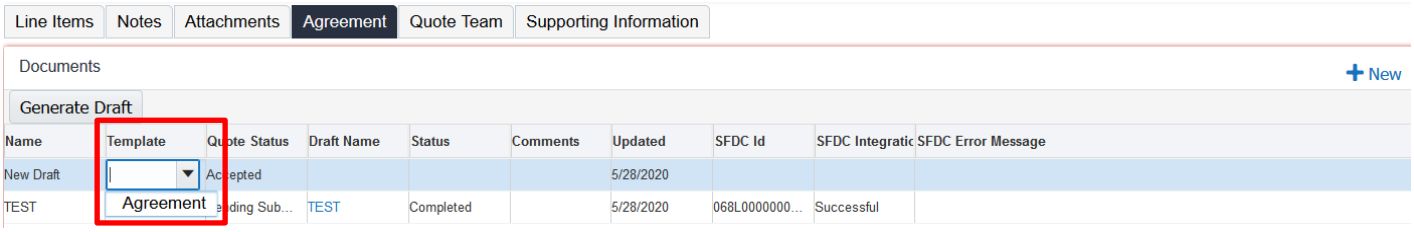
13. Follow the same steps as above to generate an Agreement for an Accepted quote. Go into the quote details and click the Agreement tab at the bottom of the screen.



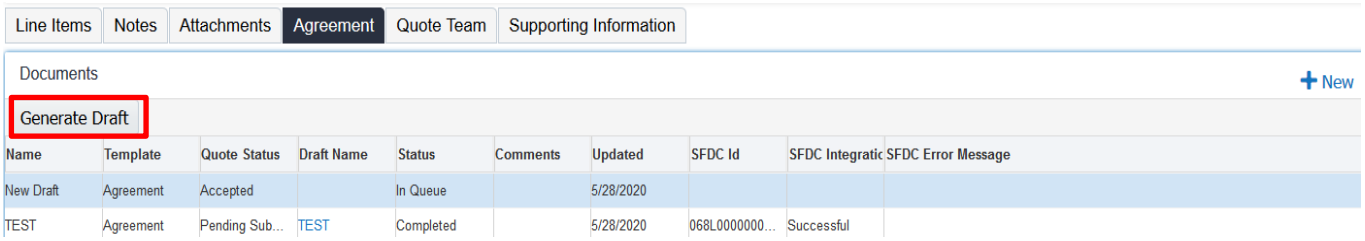
14. Click “New” and fill in the Name field.



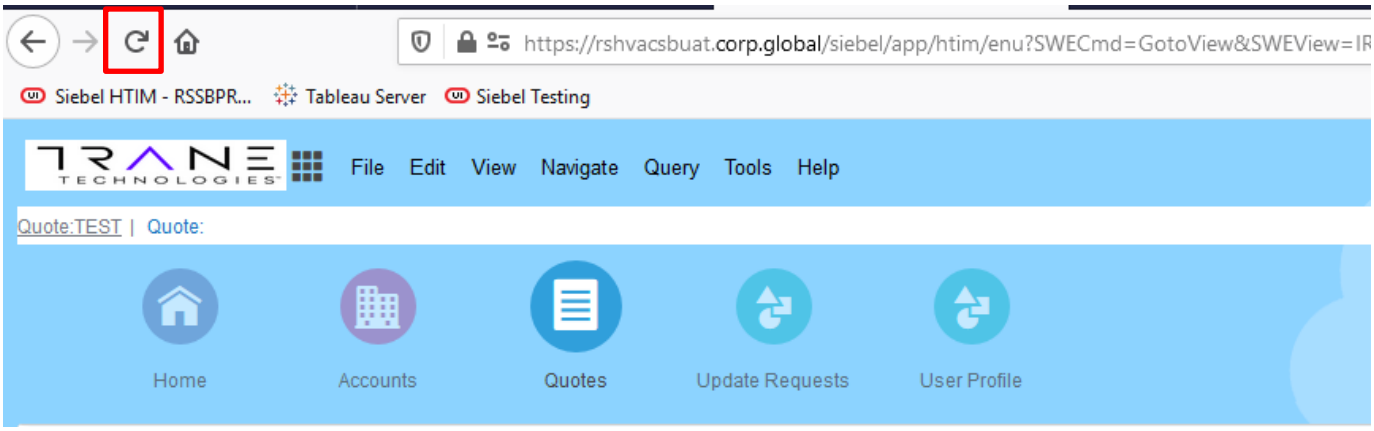
15. Next, click the drop down menu in the Template column.



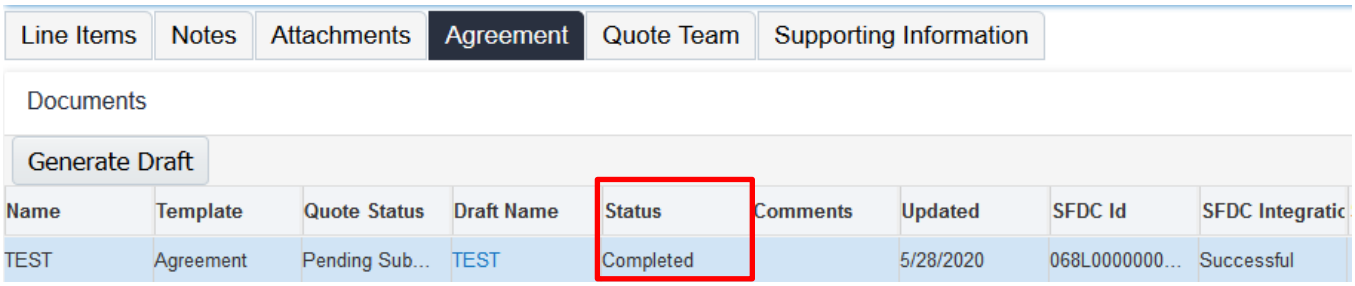
16. Once you have selected the template you want to use, click “Generate Draft”. The Status will read “In Queue” while the system is generating the document.



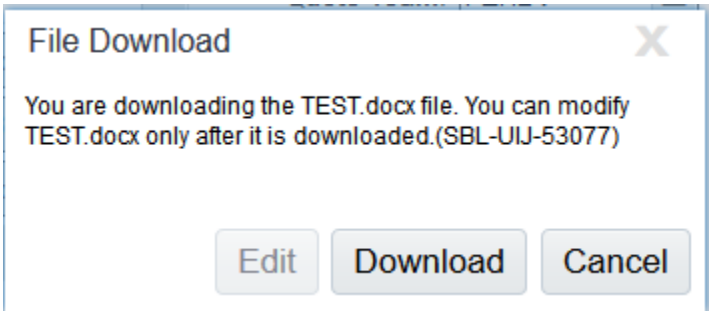
17. The status will change from “In Queue” to “Generating” to “Completed”. You can click the refresh button in the upper left hand corner of your screen to refresh the system process and get an updated status while the system is generating your document.



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



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



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)	Worksheet #:	98Q220RHQ3846
Print Date :	5/28/2020 12:39:19 PM	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