Colt

* Colt is a Network product based company which contain different network products like Ethernet, Optical, IP access, CPE…………

**Why colt?**

* Colt understands business connectivity requirements and provides high performance, high bandwidth solutions to enable customer's success, with Colt's vision entering being the most customer oriented business in the industry.
* Colt is a recognised innovator in Software Defined Networks (SDN) and Network Function Virtualisation (NFV). Privately owned, Colt is one of the most financially sound companies in its industry and able to provide the best customer experience at a competitive price.

CPQ

**CPQ (Configure Price Quote) tool:**

* CPQ is a cloud-based product catalogue and quoting tool that enables users to quickly and intelligently create price quotes with automation, combined with granular, location-based insights.
* Automated Pricing & Quoting Workflows
* Increased Productivity
* Improved ‘Win’ Rates
* Optimized Profit Margins
* It is used for selecting the right quote, right product and raise order.

**Systems and interfaces involved in the whole CPQ testing process:**

**F**ollowing are the main streams on which testing is to be done

SIEBEL

C4C

* C4C (Cloud for Customer) ---upstream---Initial configuration will be done in this system—without
* CPQ (Configure Price Quote) —middle stream—The entire product configuration and approvals are done.
* Siebel—Downstream---CRM application where we manage the orders and we will validate product details.

**Hierarchy of users involved in CPQ testing:**

Sales user>>Sales Engineer>>CST user.

Sales user privileges:

1. He can only configure the product based on requirements.
2. Only he can send approval for customer.
3. Commercial approval can be done by this sales user.

Sales Engineer privileges:

1. He has all the privileges as sales user.
2. He can change the configuration and can add another product to the quote.

CST user privileges:

1. Approve
2. Reject (Return to SE in case of any changes to be made to the order and no rights to him to change himself).

* “Interface” field is only available for wave products.
* MMT (Margin Model Tool) is used to add(change)values.
* While adding site address for product if the map is not loaded due to cache issue we are unable to proceed further by clicking on “Next” button.

CPQ opportunity and Quote Creation End-End workflow:

**Stages of workflow:**

Created>> In-progress>> Priced>> Commercial approved>> SE review>> CST review>> Technically approved>> Approved>> Send to customer>> Customer approved>> Ordered.

**Steps to understand the wok flow:**

* Login to c4c.
* Click on Sales->Quotes->Select account.
* Navigate to Opportunities tab->click on New button.
* Fill the mandatory fields->click on “Save and open” button->Opportunity is created.
* Now click on edit icon and fill legal and technical complexity and Sales user.
* Navigate to quote tab->Click on Add button.
* It should navigate to CPQ page and default tab would be general information.
* Under general information tab click on Add product button->Navigated to “Product family page”->Select a product-> System should navigate to “Configuration page”
* Populate the Address first and click on Next button.
* Now navigate to Site details tab and fill “Service bandwidth” viz., a mandatory field.
* Navigate to Features tab to add ‘Service Level and Site Level’ Features.
* Click on Save to quote button->A line item will be added under quote successfully.
* Populate Legal and Ordering contact details under general info tab.
* Now navigate to Commercial approval tab and click on Submit approval button.
* Then navigate to technical approval-> select Ready for Technical review checkbox->Click submit to Technical Review button.
* Now login as a SE proxy user-> Click on Admin button-> Click on Users button-> Choose the SE user’s profile and click on icon in the end->Then click Quote to order link.
* Search with the quote id and select the quote.
* Select the line item and click on re-configure button, check all the configuration and save the changes
* Navigate to Technical approval tab and click on Submit for CST review button.
* Now login as a CST proxy user->Click on Admin button->Click on Users button-> Choose the CST user’s profile and click on icon in the end->Then click Quote to order link.
* Search with the quote id and select the quote.
* Select the line item and click on re-configure button->navigate to Additional product data tab and populate ECLT (External Code Linking Toolkit) value->Then populate Lead time value in the line item.
* Navigate to Technical approval tab and select “Approved” tab->Quote approved.
* Now login as Sales user and Click on “Generate proposal” button->Quote will be sent as mail link notification->Customer approved->Then ordered.
* Login to Siebel and check for the ordered details.

**PPT (Portfolio-Pricing-Tool) Ethernet Line journey:**

**Stages of workflow:**

Created >>To be priced >> Portfolio pricing review >> Priced >> Commercially approved >> SE technical review >> CST technical review>> Approved >> Send to customer >>Accepted by Customer >> Submitted to order management.

**CPQ-Explore journey concepts:**

* Explore- It is a third party/off-net connectivity price billing.
* On-Net-Connectivity from colt company only.
* Off-Net-Connectivity will be given from third party to customer.
* In CPQ by default it is on-net, if require we can change to off-net.

Copy Quote, Copy line item, Bulk upload, Fast Sign, Dual entry:

Copy Quote & Copy line item:

**Copy Quote:** Create a new quote under the same opportunity, only the quote id will be different, opportunity will be the same.

**Copy line item:** We can copy multiple line items by changing the configurations like “Resiliency”, “Bandwidth”, “Contract term”.

* Login to C4C
* Create new opportunity and quote.
* Add product-> Add site address for A end and B end.
* In CPQ->Features tab-> Product section-> “Copy quote” and “Copy line items” options are seen.
* For multiple line items we can edit “Resiliency”, “Bandwidth”, “Contract term” (manually)->Update configuration.

Bulk upload (To create n number of items under a quote at the same time):

* First download the template.
* Click on line item.
* Fill mandatory fields.
* Click on “Validate all Products data” or “Validate all Ethernet data” to validate.
* On clicking line item, the product field should be auto populated as “Spoke”, if required we can change it as “Hub” manually.
* Hub will have only A end whereas Spoke will have only B end.
* Error log sheet will display all the errors of the product orders we have created.
* Now in CPQ go to Bulk upload tab->Click “upload New file”->Select the modified excel sheet.
* Click Check connectivity which will display all types of connectivity options.
* Now click Check off-net.
* Then click Refresh to update the list.
* Add to quote->Continue to quote.

Fast Sign (Sales user can close the opportunity by considering customer’s commitment):

* After the stage Commercial approval->Select Radio button “Customer committed, initiate Fast Sign closure of the opportunity.
* Return to C4C->Check for opportunity status “In progress”. (i.e., Quotes will be delivered to the customer but the opportunity has to be closed by the Sales user.)
* Navigate to “General info” tab-> Fill all mandatory fields-> Click on fast sign radio button-> Reason dropdown will be displayed and document uploading option will also be enabled.
* Now click on “Close fast sign” process and the page loads for a while depending on number of line items added to the quote.
* Once processed click submit for Technical approval.
* Go to C4C overview tab->We can find the opportunity in close status.

Note: Once opportunity is closed we can’t create any new quote.

Dual entry:

* Create new opportunity and quote.
* In features tab-> under Dual entry section->click “Please raise a manual BCP request”->Add comment->Submit->Request is created->Request I’d will be generated.
* Login as Soumya Sashi-> search for the Request I’d->Assign quote to yourself->Under Cost details tab-> Fill mandatory fields-> Click on “Send to sales”->Close the page.
* Then BCP request will be updated under “Dual entry” section.