

Final Script: ECadvantage Training Presentation

Overview

Installation and Start-up

Section Overview

This section will focus on the installation and start-up procedures for ECadvantage, including its system and connectivity requirements, installing the software, logging in to both the single and multi-distributor versions of the application, and choosing the pricing that you wish to see throughout the program.

System Requirements

Hardware Requirements

Hardware requirements for the system include a Pentium or greater processor, 24 megabytes of RAM, a super VGA display running 256 colors, and 45 megabytes of hard disk space.

The application is compatible with both Windows 95 and Windows NT.

Connectivity Requirements

For connectivity we require access to the Internet or access to the MicroAge frame relay network. Access to our frame relay requires TCP/IP as one of its network protocols.

Installing the Software

To install the ECadvantage application from the CDROM, start the source viewer in the CDROM that you were supplied with and click on 'Install Software'. Then follow the on screen directions to install both the ECquote and ECadvantage.

ECquote will install first, followed by ECadvantage.

To install from a download off the internet, download both the ECquote application and ECadvantage. Again, ECquote must be installed before ECadvantage to ensure that the links between the applications are established correctly.

Both ECquote and ECadvantage are downloaded as self-extracting, and are in a compressed format. After downloading the application, double click on the application from within the Windows Explorer.

The application will then expand itself out to its installable format. Once this is done click on 'Set-up.exe' and follow the normal Windows installation procedures.

Logging In

Once the application is installed you can log into the application. During the installation procedure an icon will be created that you can drag to your desktop or you can start the application from the ECadvantage program group.

Single Distributor

To login into the single distributor version of ECadvantage double click on the icon and a login screen appears. Type in your user ID and password that you have received from MicroAge.

Next, click on the connect button and you will be connected to ECadvantage.

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Multi-Distributor

To login to the multi-distributor version of ECadvantage you must have a multi-distributor ID from ECadvantage. If you have not received a multi-distributor ID or wish to receive one please call 1-800-246-6340.

To successfully login to the multi-distributor version you must make a one time change to a setting in the I-N-I file to point the application to the servers that contain multi-distributor pricing and availability.

From the Windows 95 or NT desktop click on the 'Start' button, click on run and type in the path where ECadvantage is located. The file that requires a modification is called conquer.ini.

Click on OK and this will bring up the I-N-I file. Under the second category of server you'll see the "server name equals" and then an address of "enterprise.ecadvantage.com." Change this address, for the multi-distributor version to "pcorder.com."

Save the file and then exit back to your desktop. Restart the application, type in your user ID and password, and this will log you in to the multi-distributor version of ECadvantage.

Choosing the Pricing You See

After logging into ECadvantage, you will have the option of deciding what pricing you would like to see during your catalog searches, Needs Analysis and other facets of ECadvantage.

To change your account selection, click on the order menu option and select ECaccount selection. Choose the appropriate pricing level based on the standard account selection or by the customer name and ship to.

Needs Analysis

Section Overview

Needs Analysis is the configuration system used by ECadvantage to build systems with all of the additional components needed. If you only have a general idea of what system and components to offer in a quote use the Needs Analysis screen to identify systems that match your customers needs.

Needs Analysis simplifies the process of selecting systems based on high level requirements that you enter within the configuration criteria screens.

In this section we will discuss how to configure both single and multiple desktop and laptop systems. We will look at the following areas:

- Configuring a desktop solution, either for one system or multiple systems.
- Navigating through the various system options available from the 'System Alternatives' screen.
- Viewing your detailed solution
- Right clicking options including:
 - Availability notification
 - Product data sheet information
 - Gathering and maintaining real time availability information by warehouse
- Choosing alternatives or replacements for individual components that the system returns.

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- We'll also discuss OEM solutions, the new area that allows you to completely configure a system from the basic components to a finished product including the assembled or not assembled option.
- We will then discuss the multi-distributor version of ECadventure and how to use 'Needs Analysis' to choose system alternatives from major distributors throughout the channel.

Configuring a Desktop Solution

Configuring One System

Choosing your System Options

In this section we'll be configuring a desktop system so I'll select 'Personal Computers'.

The next series of screens are used to configure the attributes of your system.

The first option that you have on the screen is selecting a distributor. Later on in the lesson you'll be able to choose different distributors based a multi-distributor login if you have one available.

The next option is to click whether you would prefer to see available SKU's--this can be unchecked to view all SKU's in the system, whether they are available or not.

Next, select a vendor for the system. In this example we will choose HP as our single vendor.

Now we'll select a CPU speed that meet the requirements of my customer, in this case a Pentium Pro 200 processor.

Memory can be increased or decreased based on your customer requirements. In this case we'll be configuring this system with 32 megabytes of RAM.

We can also choose whether we want EDO or regular memory, and any error detection levels we wish to include.

For the vendor of the RAM we can either select the CPU vendor, which in this case would be HP, or choose different memory vendors based on the criteria that you and your customer have selected.

The 'Any' option will find memory that is both the lowest cost and most available that will work with this configuration.

From this screen you can either click on the next button or click on this icon to continue.

The next screen brings us to our storage requirements. For the hard drive, we'll go along with the default of two gigabytes.

Disk type options include IDE, extended IDE, SCSI, wide SCSI or parallel port.

Again, for our hard drive and throughout the rest of the 'Needs Analysis' we have the option to choose the vendor for our individual components, whether we elect to stay with the CPU vendor for hard drive, CDROM and other components or to choose it based on our individual customer requirements, or based on pricing and availability needs.

For CDROM we will choose an 8 speed CDROM and we'll leave HP as the CPU vendor.

Under tape drive we can choose the format of the different drives, choose the vendor and select whether we desire an internal or external unit.

For display we'll choose a 17" monitor from the CPU vendor, HP.

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Video card resolutions give you the capability of choosing different or higher resolutions based on the needs of the software you will be running on this system.

Under communications we can choose either network or modem type. For this example we'll choose an Ethernet 100baseT connection from the CPU vendor.

We will also include a 28.8 modem from US Robotics.

For operating system software, the different options include all Windows, DOS, OS2, Netware and other operating systems. We will choose NT Workstation for our example.

We'll now click on the configure button at the lower right corner of the screen to configure the system based on the criteria we have selected.

ECadvantage has found 9 systems that met our general configuration criteria.

Navigating through System Alternatives

After systems are configured, the system alternatives screen will appear and give me different viewing options based on the criteria you choose.

This screen allows you to view the systems based on different criteria such as configuration data, pricing, availability of the entire system and price for the available systems.

First we'll look at pricing for the individual systems. This will break it down based on the single distributor version that we are in right now. This will show all the pricing for the individual systems.

The availability area shows the availability of all system components within the system. If a particular system is not available the availability will come up as zero. This does not necessarily mean that the CPU or other major components are not available.—it simply means that one of the components of our solution were not available.

The final view is pricing for available. Any time a system is fully available with all of it's components a price will appear.

The system alternatives screen can be sorted any way the user chooses simply by clicking on the different headers. For example, if we want to sort based on description click on the description column and all systems will be sorted alphabetically based on their description.

Likewise, if you would like to sort based on the least expensive system in the alternatives screen simply click on unit cost and the sort is performed. Clicking on either ascending or descending sort can change the sort order.

At the bottom of the screen we have the options to add systems to our quote, view the errors that came back, do another 'Needs Analysis' or select more alternatives for the systems that we have chosen previously.

Seeing Your Detailed Solution

To see your detailed solution simply double click on one of the systems in system alternatives and this will bring you to the system detail screen. This screen shows all SKU's that were picked for the system that we previously identified in the 'Needs Analysis'.

In this example we have picked a HP Pentium Pro200 and the individual component descriptions are listed.

Under the different components shown we have our 17" monitor, 8 speed internal CDROM drive, our HP desk direct card, Microsoft Windows NT operating system and also our US Robotics modem.

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Right Click Options

There are three main options available by right clicking on a SKU; availability notification, product data sheets and real time availability by warehouse.

Availability Notification

The availability notification area allows the user to include the part on a notification list kept locally on their system. Every time the user logs into ECadvantage or goes through a menu choice on the main menu the system searches the distributors marked and see if any system or component has become available.

For this example we will choose MicroAge as our distributor, click on notify when available and now every time that the user logs in they will be notified if that item has become available.

Product Data Sheet

The product data sheet includes specific and detailed technical information on the product like the number of slots a system has or specific memory requirements.

Our example here shows the details of the system including features and specifications, chassis type, processors and speed, expansion capabilities, and video display.

Real Time Availability by Warehouse

The real time availability by warehouse option allows you to see the MicroAge real time availability for the individual components selected based on our three main warehouses in Cincinnati, Reno and Tempe.

Current availability is shown including the estimated date of next shipment which is the receipt date and the on order status of the part.

Configuring Multiple Systems

In this section we will configure multiple systems based on customer requirements.

For this example we will choose HP and Compaq as our vendors. We will also select multiple CPU speeds including the Pentium Pro 200 and a Pentium Pro 180. Our memory requirements will remain at 32 megabytes of RAM. We will choose Kingston as our memory vendor. For our storage requirements we will go with the default of a 2 gigabyte hard drive and an 8 speed CDROM. For the CR-ROM vendor we'll choose Creative Labs.

We will choose a 21" display monitor from NEC.

For communications we will select 100baseT Ethernet and we will choose any as our vendor.

We will also include a 28.8 modem from US Robotics.

We will select Windows 95 for our operating system software.

Now I'll click on the 'configure' button and ECadvantage will return the systems that meet our general criteria.

Under our multiple system configuration 32 systems were found.

Again, to sort on any of these criteria simply click on the header you wish to sort on and indicate whether it is an ascending or descending sort.

Alternatives and Replacements

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For alternatives and replacements we can select and replace any individual component in the system that the 'Needs Analysis' has selected. In this example we will select and replace our modem. To replace it simply click on the line to highlight it and then click on the 'replace' button.

Our replace option has returned a number of options and from here we can sort again based on any of the criteria. For example, if we'd like to see the most available simply click on the available column.

From here we can select which component we would like to replace into our system. Initially we had a US Robotics modem and we will be replacing this with the Boca 28 8 Simply double click on the component to replace and the 'Needs Analysis' configuration engine will verify that the component selected will be compatible with this system.

OEM Solutions

Choosing your Individual Components

(Note: We are highlighting MicroAge house brand, which will be changed in the final presentation.)

For OEM solutions ECadantage has the capability of configuring a system from the motherboard all the way up to an assembled component. The basic differences between this system and the others we have configured previously is that we will be picking MicroAge house brand as our system vendor.

We will select two CPU speeds, a Pentium 200 and a Pentium 166.

Under memory requirements we will select 32 megabytes of RAM.

For OEM solutions, when choosing individual components, to remain with the OEM solutions brand you must select CPU vendor for all our individual components.

As we go through and choose hard drive, CDROM and other options we will be staying with the CPU vendor option to allow it to go ahead and pick the proper components for OEM solutions.

We will choose a 17" monitor, our networking type and modem will be left blank for this example, and for our operating system we'll choose Windows 95.

Selecting Assembled or Not Assembled Options

Under services you have the option to select whether we wish to have MicroAge assemble the components or to go ahead to have the components shipped individually to your location and be assembled by your staff.

For this example we will choose 'assembled'.

Next, click on the 'configure' button and ECadantage finds two options that meet our general criteria.

Under the system detail screen notice that it has included the motherboard, mini tower chassis, our 8 speed CDROM, keyboard, an ATI 3D expression graphics card, CTX monitor, Intel Pentium processor, Kingston Technologies memory module, Microsoft Windows 95, and a Seagate 2 gigabyte hard drive.

All of these components have been verified to work correctly under the Acer Open criteria and are part of the OEM solutions pricing structure.

Multi-Distributor Needs Analysis

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Multi-Distributor 'Needs Analysis' allows the user to select system components based on similar criteria that is covered in detail in other sections within this presentation, but offers greater alternatives through the distribution channel through major distribution partners that have participated with ECadvantage.

Multi-Distributor System Alternatives

Under our 'Systems Alternatives' screen it has returned the options that we have selected based our 'Needs Analysis' criteria.

The views under multi-distributor will be much different than the views under single distributor. For example, when we click on the pricing view we will now see pricing for the different systems throughout the five major distributors.

We could also select our availability view to select availability throughout the channel to see which distributors have all components in stock and at what levels.

Finally we could select 'pricing for available' and find out by price what distributors have entire system options available throughout the channel.

Multi-Distributor System Detail

For multi-distributor system detail we simply click on a system that we have selected and go to the 'system detail' screen. Our view returns MicroAge as our primary distributor, however we can change this and view across the channel the different parts based on the different distributor including their cost and availability.

Product Searching

Section Overview

Under product searching we will be focusing on catalog searching, including searching by part number, class and category and performing advanced searching techniques.

We will also be doing a new type of searching, attribute searching which will allow us to look for components based on the particular characteristics of that component and then adding those components to your quote.

We'll also be looking at the difference between 'Single Distributor' searching and "Multi-Distributor' searching including how to search across the channel to find the product that we need for our user and the real time availability by warehouse across the major distributors.

Catalog Searching (Authorization)

Searching by Part Number

Under our 'catalog search' screen we have the option to search based on either manufacturer part number or distributor part number.

For our first example we will search on a manufacturer part number that starts with 3c509B. By searching under manufacturer part number we can search on partial part numbers. Under the 3c509B option we have found 45 items.

Our different columns include our manufacturer part number, the vendor, description of the product, the distributor, the distributor part number, our price and availability, the class and category of the components that have been selected, and whether you are authorized to purchase the product from MicroAge.

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Let's perform another search using a distributor part number. First, click on distributor part number. We then have the option of either say 'starts with' or the equals sign. By specifying the equals sign you must type in the entire part number.

We will indicate the distributor part number starts with TSH-A. This search will find all of the MicroAge part numbers that start with TSH-A.

ECadvantage returns 23 part numbers. We have the option at this point to either sort on any of the criteria, for example to sort by lowest cost simply click on the price column and the list is sorted by price.

We also have the option during our searches to show only available items. This narrows the search down tremendously. We will perform the same search for distributor part numbers starts with THS-A but this time we will show only available items. This search returns only 9 items.

Searching by Class/Category

Searching by class or category allows the user to search based on criteria under class such as desktop, floppy drive, laptop and other system criteria.

For this example we will choose a laptop for our class.

Our categories are now based on the class we have chosen. We will choose Pentium 133 for our category and Toshiba for our vendor. ECadvantage returns with 5 items. Again, we can sort based on any criteria simply by clicking on the column header.

Under our catalog search screen we can also perform the same right click functions as we did in the 'Needs Analysis'. By simply right clicking on a part we can look at availability notification, product data sheets or real time availability by warehouse.

Let's do another search that includes class, category, vendor and pricing. We'll choose 'desktop' for our class, a 'Pentium Pro 200' for our category, 'HP' for our vendor, and under \$2,000.00 for our price. When we click on search the system returns 5 items.

From here we can move items to what we call a 'shopping list' simply by double clicking on the item. This allows us to maintain a list of items that we wish to save either for quoting purposes or to put together into a system and verify if the components work together correctly.

We have added the Pentium Pro 200 to our shopping list. From here click on the 'clear' button and then perform other searches and add the results of these additional searches to your shopping list.

Once you are complete with all your searches your shopping list items can be added to a quote by clicking 'Add shopping List Items to Quote'.

Attribute Searching

Search Types

Attribute searching is a new area in ECadvantage that allows you to search for product based on the individual characteristics of the components that you are selecting.

To activate attribute based searching click on the 'SKU' option under the main menu and select 'Add from Attribute based Search'.

Your attribute based search screen will appear and from here you have the option to choose what search types or components you wish to search.

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Components can include hard drives, CD-ROM's tape drives or floppies, system memory, different control or network cards, modems, and monitors.

Attributes of the Component

For our first example we will search on a hard drive. By searching on hard drive we select the attributes for that particular component. The attributes for hard drive include interface type, capacity, and whether it is an internal or external drive.

We'll choose a SCSI, capacity greater than or equal to 1 gigabyte and click on 'search'. The system returns the results. These can then be added to our shopping list.

Let's go back to search criteria and choose a monitor this time. For attributes we'll select a size and video mode. The search results for this query are then returned. Now we'll add a monitor to our shopping list and then from here we have the option of adding our shopping list items to our quote.

Multi-Distributor Searching

Multi-distributor catalog searching allows the user to search based on the same criteria as our regular catalog search but allows the user to view the components across the distribution channel.

We'll do a search based on manufacturer part number, D4774N. This time however the system will return results based on the major distributors for this particular part number across the channel. Again, we will be able to click on any of the column headers to sort based on these columns.

We searched on a desktop Pentium Pro 200 from HP across the major distributors throughout the channel.

Now, by right clicking we have the same options for availability notification, product data sheets, and real time availability by warehouse.

Under availability notification however, this allows you to select any or all of the distributors you wish to be notified by when the part becomes available.

We can also right click and perform a real time availability by warehouse. Real time availability for multi-distributor ECadvantage includes real time availability for Intelligent Electronics, Tech Data, Ingram and MicroAge.

Under the multi-distributor searching option when we right click and do real time availability by warehouse, this option shows the availability across the channel for the major distributors by warehouse. This is an option not available in any other single software package.

Quoting

Section Overview

ECadvantage has a robust quoting system that can be used to generate customer quotes and information on systems. Quotes can include bill to and ship to information, freight and tax charges, as well as full system descriptions.

The system can also export out to ECquote, the custom quoting application that can create quote layouts in a variety of formats.

In both ECquote and the quoting module in ECadvantage descriptions of all the items can be user modified and SKU's can be added to the quote on the fly.

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This section will focus on basic quoting functions including creation of a new quote, opening an existing quote, adding components to the quote on your screen, and searching on quotes that have been previously created.

We will look at features in the quote screen including changing your component sell price, mark-up sell price and gross profit percentage.

We will also discuss how to save and refresh a quote that has been previously created.

We will also cover advanced features of the ECadvantage quoting system including the addition of third party SKU's, changing and adding gross profit tax and freight, modifying the quote header and exporting and importing a quote.

Basic Quote Functions

Creating a New Quote and Adding Components

To create a new quote and add components to it we have the option to add components based on 'Needs Analysis', catalog search, or adding components using a distributor part number.

Adding Systems from a Needs Analysis Search

To add the parts from a 'Needs Analysis' open a blank quote, click on 'system' and go to 'Needs Analysis'.

Enter the system you would like to add to a quote.

Once our 'Needs Analysis' has returned with system alternatives we simply select the system or systems we wish to add to a quote. This can be done by highlighting one system, holding your mouse key down, and dragging to highlight several systems or holding your control key down and clicking individual systems you wish to add.

We'll add three systems to our quote by identifying the systems. Then click on 'Add to Quote'.

You'll notice that the systems are now indicated on the top part of the screen and at the bottom the individual components are listed. As we click each system notice that the different components that make up each system are listed.

Adding Components from a Catalog Search

For this example we will do a simple catalog search and add components based on that search.

For our catalog search to add components to our new quote we have chosen a monitor/display for class, greater than or equal to for category and NEC for our vendor. The system has returned 8 items and we're going to select two of these items to add to our quote.

By double clicking these items they are added to our shopping list. Next, click on 'Add Shopping List Items to Quote'.

This has added two items to the bottom part of our screen. On the top part of the screen you'll notice it indicates new system description.

Adding a Component using the Distributor Part Number

Components can also be added to a quote by entering the specific distributor part number. You must enter the exact part number for the system to find the component you desire.

To enter the part number click on the SKU column in an open area, type your distributor part number in, TSH-A-10770, and press enter. This will add the component to the system that has been highlighted up above.

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Features of the Quote Screen

The quote number appears in the top left corner of the screen followed by customer name, the pricing profiles that have been assigned to this particular quote and the date the quote was created.

There are also columns that indicate gross profit over the entire quote, our cost and sub-total for the quote, any tax or freight that have been included and the total of the quote.

In the bottom half of the screen the status of the configuration is indicated, along with the distributor and it's associated part number, our quantity, description, unit cost and extended cost, gross profit percentage, our sell prices and our quantities available in stock.

Most of these features can be modified simply by clicking on the column and entering in different information. For example, if we want to increase the quantity of this part we simply click on this column and type in our quantity desired. By pressing enter it automatically modifies the extended cost and extended sell of the part that has been modified.

Changing your Components Sell Price and Mark-up

To modify component sell price or mark-up simply go to the bottom of the screen and scroll to the right until you find the unit sell column of the item you wish to modify. Double click on the item and enter a different sell price and this will automatically modify the extended sell and the gross profit percentage of this item.

The gross profit percentage column can be modified in the same manner. This can be done at the SKU level or for the entire quote.

For this example we'll make a modification at the SKU level. Simply double click on the gross profit column of the item you wish to modify, and enter the amount you wish to have for a gross profit.

By editing your gross profit percentage the system automatically modifies the unit and extended sell prices of the item.

Saving your Quote

To save your quote simply click either on the diskette icon or click on file and save quote. This will open the save quote window which allows you to enter a customer name, indicate the status (whether it is a quote or an order) and any comments you wish to include with the quote.

Once finished click on the 'save' button and this will save your quote.

Opening an Existing Quote

To open an existing quote simply click on file and open quote. This screen will indicate the quotes that have been saved under the current user ID.

To find other quotes in the system simply click on the user ID column, type in an asterisk for a wild card search, and press enter. This allows the user to search based on any user ID in the system. Other columns can also be searched on based on the asterisk or by typing in partial criteria and an asterisk. For example, we can enter part of a quote number followed by an asterisk to find all the quotes that meet this criterion.

After finding the quote you need simply double click on it to open the quote.

Refreshing your Quote