Intel Configure to Order (CTO) Tool Q&A

December 2017

Overview

Q: What is this tool used for?

The CTO tool is used by resellers, distributors and direct customers to initiate a quote for configure-to-order (CTO) Intel® Data Center Blocks (Intel® DCB). Upon submission, the configuration will be priced by the selected Intel® Authorized Distributor, and sent back to the reseller for acceptance.

Q: Does this tool replace the previous process for quoting HPC Compute Blocks?

Yes. This is the new process for initiating a quote for configure to order Data Center Blocks, and replaces the previous Intel HPC configuration spreadsheet and email process.

Q: Who can use the tool?

The CTO Tool is designed for resellers, distributors and direct accounts looking to purchase a configure-to-order Intel® Data Center Block. Access is granted to partners with Intel® Technology Provider (ITP) Platinum credentials. If you are not an ITP Platinum partner, you can request access from your Intel representative.

Q: How do I access the tool?

Automatic access to the tool requires ITP Platinum credentials. However, non-Platinum partners can request access from their Intel representative. Links to the tool can be found the following ways:

- ITP Web Site: http://www.intel.com/content/www/us/en/technology-provider/products-and-solutions/overview.html
- Intel Data Center Block product pages: www.intel.com/dcb
- Direct link: https://orderconfigurator.intel.com

Q: Does the CTO Tool replace the Server Configurator Tool (SCT)?

Not at this time. The CTO Tool is specifically designed to configure an Intel® Data Center Block system with validated Intel components and memory that is integrated in the Intel factory. The Server Configurator Tool can be used to configure systems with validated Intel & non-Intel components. The SCT generates a bill of materials list that can be sent to an Intel® Authorized Distributor for pricing and ordering at the component level.

Q: How long will it take to get my quotation?

The target SLA for processing requests for quotation is within 2 business days. You will receive a notification from the tool that your configuration has been priced at which point your preferred Intel® Authorized Distributor will send you the quote.

Q: How do I know when my quote has been priced?

Resellers will receive an email notification from the CTO tool that their configuration has been priced and the configuration will appear in the priced tab in the tool. An email notification will also be sent to your selected Intel® Authorized Distributor who will send you the priced quote. Pricing in the tool will only be visible to the selected Distributor.

Q: Do I have to use a distributor?
Yes. Quote pricing is only available through your selected Intel® Authorized Distributor.

Q: Who do I contact if I have a problem or question about the tool?
For technical assistance with the tool contact CTO_Tool_Help@Intel.com. For assistance with product configuration, please contact your Intel representative.

Q: Is there training on how to use the tool?
Training resources and additional information on the CTO process can be found online:
- ITP Web Site: http://www.intel.com/content/www/us/en/technology-provider/products-and-solutions/overview.html
- Intel Data Center Block product pages: www.intel.com/dcb

Creating a Quote Request

Q: How do I create a new request?
To create a new quote request, log in to the CTO Tool and click on the '+ Create Quote' button. This will direct you to the new quote page where you can add and configure products.
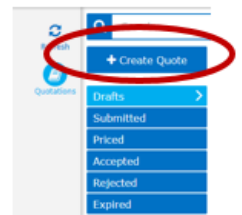
Q: Which Distributor should I select?
You have the ability to select your preferred distributor. Select an Intel® Authorized Distributor in your region from the drop down list provided.

Q: What should I select for the REQ Date?
The REQ date is the requested system delivery date to the reseller and needs to be set at least three to four weeks out from the submitted date.

Q: How do I create a new configuration?
On the left side of the quote screen, click on the "+" sign next to the desired product in the catalog.

Q: How do I configure a product?
Once you've selected your desired product, click the "Gears" icon to configure an item. This will take you to a screen with the configurable options arranged in tabs. Click the "Save" icon on the left when done.

Q: In a configuration, what does the orange triangle icon with an exclamation mark ⚠ mean?
It means that certain required characteristic(s) have not yet been specified. The icon will appear next to the characteristics that must be specified and on tabs that contain such characteristics.

Q: In a configuration, what does the red circle icon with the 'X' inside ⊗ mean?
It means that values assigned to certain characteristics violate predefined rules and the configuration is inconsistent. You must undo recent characteristic selections that caused the inconsistency. The icon will appear next to the characteristics that are inconsistent and on tabs that contain such characteristics.

Q: Why don't I see all components in the CONTROL PANEL Summary view?

The Summary view only shows components that were selected by the user in the configurator. Components that are automatically selected by the configuration rules won't be visible. The distributor will receive the full list of components by email.

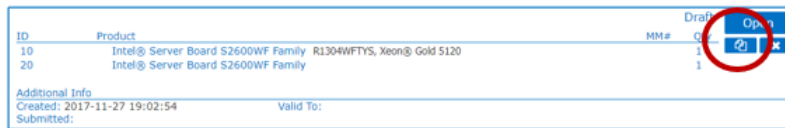**Q: Can I have multiple configurations of the same server type on a single quote request?**

Yes.

- If you plan to purchase multiple variations of the configuration, you can:
  - Click on the '+' button next to that server family and "Add new" multiple times to create the desired number of items and then configure each item

  OR

  - You can add one server, configure and save it. From the drafts tab, copy it multiple times by clicking on the copy button and then make the changes to your copied configurations.

- If you want to compare prices on different configurations within the same server product family but only plan to purchase one configuration you can:
  - Select a server product family with the product catalog and configure it. Click "+Add Alternative copy" and make any desired changes to the configuration. This method will only allow you to accept one configuration.

Q: Can I have multiple configurations with different server types in a single quote request?

Yes. You can add multiple configurations with different server product families to a single quote request and can choose to accept some or all of the configurations once you receive the price quote from your distributor.

Q: How do I create a copy of an entire quote?

Click the copy icon on the right side of the quote screen (Figure 1 below). You will then be taken to a new quote page. You can also click on the copy icon of any quote on the dashboard (Figure 2 below).

Figure 1

Figure 2

Q: Does copying an item copy its configuration as well?

Yes. The copied item has the exact same configuration as the original. You can change the configuration as needed before submitting for pricing.

Q: Can I export my bill of materials?

This capability is currently not enabled but will be made available in a future update to the tool.

Quoting Process

Q: Why can't I see the pricing of my quote in the Portal?

The Distributor you selected will contact you when pricing for the items you requested is ready for review. You can also contact them once your submitted request shows as "Priced" in the CTO tool dashboard.

Q: How do I know when my submitted request has been priced?

You will receive an email from Intel. Your request will now appear in the "Priced" tab of the tool dashboard. If you are viewing a quote, you can click the "Check Status" button to see current status.

Q: Can I accept only certain items in my quote?

Yes. Since your distributor will be accepting the quote on your behalf, you need to inform them of which item(s) you want to accept.

Q: Can I edit my configurations after my quote has been submitted?

Not directly. Once a request is submitted, all details in the request (except quantity) are locked to prevent inconsistencies between the configuration requested and the configuration priced. If you want to change any details in your request, you can copy your quote, make changes to the copy, and then submit the copy.

Q: Can I accept a different quantity than I submitted?

Yes. Open the configuration from the priced tab in the dashboard and revise the quantity. Once the revision is complete and you are ready to accept the quote, your distributor will need to accept the quote in the tool dashboard on your behalf.

Q: What should I provide my distributor when I want to Accept quote item(s)?
You should confirm the date at which you want the items to be delivered. Then, confirm the quantity of each of the Accepted items. The distributor will update these upon quote Acceptance.

Q: What happens when a quote expires?
The quote will appear in the Expired tab in your tool dashboard. An expired quote can be copied to a new quote which would need to be resubmitted for pricing.

Q: How can I re-submit an Expired or previously Rejected quote?
There are two ways of doing this.
a. Copy the quote request to a new Draft Quote. You will have to re-enter the required fields again and then submit to Intel for pricing.
b. Open the quote and select the Re-Submit button to return it to Submitted status. Intel will review the quote and make any required updates.

Q: How do I edit or cancel a quote that I previously accepted?
When a quote is accepted, edits cannot be made in the tool. Contact your chosen Distributor to find out if the order can be edited or cancelled.