



# Dell Solutions Configurator How-to Guide



PartnerDirect

# Dell Solutions Configurator: What is it?

- The Dell Solutions Configurator is a solutions configuration and collaboration tool with the ability to create and customise Dell solutions through a unique self-service online experience, easing the way you do business with Dell.
- Configure all kinds of enterprise solutions through the PartnerDirect portal, including blades, storage, servers, networking, virtualisation, data centre and active infrastructure solutions.
- The Dell Solutions Configurator allows you to:
  - Configure a Dell solution more quickly with full validation rules.
  - Address end-customer's needs autonomously and proactively.
  - Collaborate with your Dell Sales Representative on the configuration.
  - Turn around a complete configuration easily.
  - Shorten the time between the initial request and the final purchase.



“Tool is great, quick and easy.

I especially like the link to SFDC.” — Dell Partner

“Great to see that my TSR can  
update my configuration,

while I’m seeing updates in my tool.” — Dell Partner

“Good to configure

blade solutions.” — Dell Partner

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# Column preferences

Your Solutions

The Your Solutions Page is the starting point for creating new solutions and managing your existing solutions. To see all versions outside of the last saved version select "All Versions" to be taken to the version history page. Use Column Preferences menu to adjust optional columns.

Create New Solution

Deal Id	Solution Group
4151480	General
4151480	General
	Template
	General

## Column Preferences

Uncheck columns to hide them. Drag and drop to reorder columns.

- ☒ Deal Id
- ☒ Solution Group
- ☒ Solution Name
- ☒ Solution ID
- ☐ Owner
- ☒ Last Edited
- ☒ List price \*
- ☐ Company Name

Apply Reset Resets table to default view.

- Drag-and-drop to view the list the way you'd like.
- Columns will appear with the first column in the preference list on the far left.



# Creating a new solution

Your Solutions

The Your Solutions Page is the starting point for creating new solutions and managing your existing solutions. To see all versions outside of the last saved version select "All Versions" to be taken to the version history page. Use Column Preferences menu to adjust optional columns.

Create New Solution

Deal Id	Solution Group
4151480	General
4151480	General
	Template
	General

## New Solution

Solution Name

Solution Group

Create Cancel

Back to Your Solutions

**EMEA demo** [edit name](#) #0.1 [←](#)

[template](#) Last Modified 08/02/2013 by UK Tester 1

[Save](#) [Print](#) [Export](#) [Share](#)

Add Product Configuration Description/History

- "Solution Name" and "Solution Group" should be meaningful to you and your project.

- Once changed it will reflect here. In this example, the name was changed to "EMEA demo" and group has been named "template".

- Click "Save" to save this change.



# Adding products

Solution Configurator

[Back to Your Solutions](#)

**EMEA demo** [edit name](#) #0.1  
template Last Modified 08/02/2013 by UK Tester 1

List price \*  
**£0.00**

[Save](#) [Print](#) [Export](#) [Share](#) [Contact Dell](#) [Associate with Deal](#)

**Add Product** **Configuration** **Description/History**

Force10

Viewing 1 - 10 of 10 < 1 10 items per page

Category			
ADDITIONAL PRODUCTS	Force10 M1000F FI Switch	<a href="#">Add to Solution</a>	<a href="#">Product Details</a>
ADDITIONAL PRODUCTS	FORCE10 M1000F NFI Switch	<a href="#">Add to Solution</a>	<a href="#">Product Details</a>
DATA CENTER INFRASTRUCTURE	Force10 C150	<a href="#">Add to Solution</a>	<a href="#">Product Details</a>
DATA CENTER INFRASTRUCTURE	Force10 C300	<a href="#">Add to Solution</a>	<a href="#">Product Details</a>
NETWORKING - BLADE CHASSIS SWITCH	PowerEdge R420	<a href="#">Add to Solution</a>	<a href="#">Product Details</a>
NETWORKING - CHASSIS SWITCH	PowerEdge R510	<a href="#">Add to Solution</a>	<a href="#">Product Details</a>
NETWORKING - MISCELLANEOUS	PowerEdge R515	<a href="#">Add to Solution</a>	<a href="#">Product Details</a>
NETWORKING - RACK - ETHERNET	PowerEdge R520	<a href="#">Add to Solution</a>	<a href="#">Product Details</a>
NETWORKING - RACK - FIBRE CHANNEL	PowerEdge R620	<a href="#">Add to Solution</a>	<a href="#">Product Details</a>
SERVER - BLADE	PowerEdge R715	<a href="#">Add to Solution</a>	<a href="#">Product Details</a>
SERVER - CLOUD			
SERVER - RACK			
SERVER - TOWER			
STORAGE - BACK-UP AND ARCHIVE			
STORAGE - NETWORK ATTACHED STORAGE			
STORAGE - STORAGE AREA NETWORK			

The Solutions Configurator is a solutions building & collaborative platform providing an entirely new experience in configuring Dell Solutions. The FAQ page answers frequently asked questions when building solutions to best answer your customers' needs and provide you the easiest configuration experience with Dell.

[Answers to frequently asked questions](#)

There are various ways to add products:

- Use the left navigation tree.
- Search by product name (example: Force10).
- Simply click on "Add to Solution".





# Adding products, continued

**Solution Configurator**

Back to Your Solutions

**EMEA demo** edit name #0.1  
template Last Modified 08/02/2013 by UK Tester 1

List price \*  
**£0.00**

Save Print Export Share

Contact Dell Associate with Deal >

**Add Product** Configuration

Category

- ADDITIONAL PRODUCTS
- DATA CENTER INFRASTRUCTURE
- NETWORKING - BLADE CHASSIS SWITCH
- NETWORKING - CHASSIS SWITCH
- NETWORKING - MISCELLANEOUS
- NETWORKING - RACK - ETHERNET
- NETWORKING - RACK - FIBRE CHANNEL
- SERVER - BLADE
- SERVER - CLOUD
- SERVER - RACK
- SERVER - TOWER
- STORAGE - BACK-UP AND ARCHIVE
- STORAGE - NETWORK ATTACHED STORAGE
- STORAGE - STORAGE AREA NETWORK

**Add to Solution**

Product Name  
PowerEdge R620

(You can adjust quantities of each configuration under the configuration tab.)

Add Cancel

PowerEdge R515 Add to Solution Product Details

**Add to Solution**

Product Name  
PowerEdge R620 email

(You can adjust quantities of each configuration under the configuration tab.)

Add Cancel

- Customise the name of your product.
- Always click "Save".
- Click "X" to clear the search and return to the main product selection view.
- When configuring blades, it is a best practice to add the blade chassis first.
- "Save" will overwrite all changes.



# Managing your configuration

Solution Configurator

[Back to Your Solutions](#) [Other Versions](#)

**EMEA demo** [edit name](#) #25504.1 [template](#) Last Modified 02/08/2013 by UK Tester 1

Save Save As Print Export Share Add Collaborator

Contact Dell Associate with Deal

Add Product Configuration Description/History

Viewing 1 - 3 of 3 10 items per page

Category	Product	Default Name	Quantity	Unit Price
Server	PowerEdge R620 email	PowerEdge R620	1 update	£6,474.00
EthernetRackSwitch	Force10 S60	Force10 S60	1 update	£10,448.76
EqualLogic	EqualLogic PS6100S RACK	EqualLogic PS6100S RACK	1 update	£39,797.10

After you "Save" you will have a Solution ID.

- Create your solutions as you'd like.
- Update quantities.
- Save after each change.
- As a best practice, record your Solution ID as your point of record.



# Managing your configuration, continued

[Back to Your Solutions](#)   [Other Versions](#)

**EMEA demo (1)** [edit name](#) #25505.1 ←

[EMEA](#) Last Modified 08/02/2013 by UK Tester 1

Save   Save As   Print   Export   Share   Add Collaborator

[Add Product](#)   [Configuration](#)   [Description/History](#)

- To save a new version, click “Save As”, change whatever you would like and save.



# Managing alerts

The screenshot displays the Dell PartnerDirect interface. At the top, a table lists products with columns: Category, Product, Default Name, Quantity, and Unit Price. The table shows two items: a Server (PowerEdge R620 email) and an EthernetRackSwitch (Force10 S60). Below the table, an 'Alerts' section is highlighted with a yellow background and a warning icon. The alert message states: 'A matching L3 option in the Software Module and a matching Layer 3 Software Support option from the Software Maintenance and Support Module must be selected together'. Below the alert, an 'Options' section is visible, showing a list of categories: Modules, Power Supplies, Power Cords, Optics, Cables, and Software. The 'Software' category is expanded, showing 'FTOS - Force10 Operating System S'. A modal window is open in the foreground, showing the 'Add Product' tab. It contains a table with the same columns as the main table, listing three items: a Server, an EthernetRackSwitch, and an EqualLogic product. The modal also includes a 'Viewing 1 - 3 of 3' indicator and a 'Column Preferences' dropdown set to '10 Items per page'.

Category	Product	Default Name	Quantity	Unit Price
Server	PowerEdge R620 email	Split PowerEdge R620	1 update	£6,474.00
EthernetRackSwitch	Force10 S60	Split Force10 S60	1 update	£10,448.76

**Alerts**

- A matching L3 option in the Software Module and a matching Layer 3 Software Support option from the Software Maintenance and Support Module must be selected together

**Options**

- EthernetRackSwitch
- Force10 S60
- Split
- Force10 S60
- 1 update
- £10,448.76

**Add Product**

Category	Product	Default Name	Quantity	Unit Price
Server	PowerEdge R620 email	Split PowerEdge R620	1 update	£6,474.00
EthernetRackSwitch	Force10 S60	Split Force10 S60	1 update	£11,662.76
EqualLogic	EqualLogic P56100S RACK	Split EqualLogic P56100S RACK	1 update	£39,797.10

- Alerts can be resolved by you or your inside representative. Configure as you would like to see your solution and save.
- In some cases, you can click the hyperlink, select the box that the alert opens and the error will fix itself.



# Splitting configurations

Add Product Configuration Description/History					
Viewing 1 - 3 of 3 < 1 > Column Preferences 10 items per page					
<input type="checkbox"/>	Category	Product	Default Name	Quantity	Unit Price
▼ <input type="checkbox"/>	Server	PowerEdge R620 email	Split PowerEdge R620	<input type="text" value="3"/> update	£6,474.00
▼ <input type="checkbox"/>	EthernetRackSwitch	Force10 S60	Split Force10 S60	<input type="text" value="2"/> update	£11,662.76
▼ <input type="checkbox"/>	EqualLogic	EqualLogic PS6100S RACK	Split EqualLogic PS6100S RACK	<input type="text" value="1"/> update	£39,797.10

## Split

Split PowerEdge R620 email to two items.  
All selected options will copy to the new item.

Total: 3

Create new item with:  Max 2

Remaining: 1

Ok

Cancel

<input type="checkbox"/>	Category	Product	Default Name	Quantity	Unit Price
▼ <input type="checkbox"/>	Server	PowerEdge R620 email [1]	Split PowerEdge R620	<input type="text" value="2"/> update	£6,474.00
▼ <input type="checkbox"/>	Server	PowerEdge R620 email	Split PowerEdge R620	<input type="text" value="1"/> update	£6,474.00
▼ <input type="checkbox"/>	EthernetRackSwitch	Force10 S60	Split Force10 S60	<input type="text" value="1"/> update	£11,662.76
▼ <input type="checkbox"/>	EqualLogic	EqualLogic PS6100S RACK	Split EqualLogic PS6100S RACK	<input type="text" value="1"/> update	£39,797.10

**Step 1:** Update your quantities.

**Step 2:** Choose the product you want to split by clicking on the product name.

**Step 3:** You will now see the split item in the list view. Rename your split product.



# Splitting configurations, continued

Category	Product	Default Name	Quantity	Unit Price
Server	PowerEdge R620 email [1]	Split PowerEdge R620	2 update	£6,474.00

**Options**

- HARDWARE OPTIONS
- ADDITIONAL HARDWARE OPTIONS
- OPERATING SYSTEM AND ADDITIONAL LICENSE OPTIONS
- BACKUP SOLUTIONS AND SOFTWARE OPTIONS
- Other options
- EXTENDED SERVICES AND INSTALLATION OPTIONS

**Step 4:** Customise your product and click “Save”. Customisation is standard practice for adding new products or splitting products.

- Square buttons will indicate multi-select options and quantities can be edited.
- Radio buttons will indicate single select items.

**Memory Capacity** [Help Me Choose](#)

☐ 2GB RDIMM, 1333 MHz, Low Volt, Single Rank, x8 x 1

☐ 4GB RDIMM, 1333 MHz, Low Volt, Single Rank, x4 x 1

☐ 4GB RDIMM, 1333 MHz, Low Volt, Dual Rank, x8 x 1

☒ 8GB RDIMM, 1333 MHz, Low Volt, Dual Rank, x4 x 8

**Memory Capacity** [Help Me Choose](#)

☐ 2GB RDIMM, 1333 MHz, Low Volt, Single Rank, x8 x 1

☐ 4GB RDIMM, 1333 MHz, Low Volt, Single Rank, x4 x 1

☐ 4GB RDIMM, 1333 MHz, Low Volt, Dual Rank, x8 x 1

☒ 8GB RDIMM, 1333 MHz, Low Volt, Dual Rank, x4 x  [Update](#) [Cancel](#)

**Options**

**Processor** [Help Me Choose](#)

☐ Intel® Xeon® E5-2603 1.80GHz, 10M Cache, 6.4GT/s QPI, No Turbo, 4C, 80W, DDR3-1066MHz

☐ Intel® Xeon® E5-2609 2.40GHz, 10M Cache, 6.4GT/s QPI, No Turbo, 4C, 80W, DDR3-1066MHz



# Adding a collaborator

The screenshot shows the Dell PartnerDirect interface for a solution named 'EMEA demo (1)'. At the top, there are links for 'Back to Your Solutions' and 'Other Versions'. Below this, the solution name 'EMEA demo (1)' is displayed with an 'edit name' link and a solution ID '#25505.1'. Underneath, it says 'EMEA Last Modified 08/02/2013 by UK Tester 1'. A row of icons includes 'Save', 'Save As', 'Print', 'Export', 'Share', and 'Add Collaborator'. Below the icons are three tabs: 'Add Product', 'Configuration', and 'Description/History'. A modal dialog box titled 'Add Collaborator' is open, containing the text 'Enter email to add a collaborator to this solution', an empty text input field, and two buttons: 'Add' and 'Cancel'.

**Step 1:** Click on “Add Collaborator”. This option will not be available until a Solution ID has been issued.

**Note:** Solution owner is the only person who can add or remove collaborators.

**Step 2:** Enter the collaborator’s email address. You will need to click “Share” after adding them as a collaborator.

**Note:** Click “Add” twice, then you will need to click “Save”.

**Note:** Dell.com email addresses should not be added here, as they do not have PartnerDirect access in most cases.



# Adding a collaborator, continued

[Back to Your Solutions](#)   [Other Versions](#)

**EMEA demo (1)** [edit name](#) #25505.1

[EMEA](#) Last Modified 08/02/2013 by UK Tester 1

**Step 3:** Click "Other Version".

Your Version History

[Back to Your Solutions](#)

**EMEA demo (1)**

#25505

Owner  
UK Tester 1

Collaborators  
Joanna Norling[X]  
[Add](#)

Deal Company/Id#

Created  
08/02/2013

Solution Group  
[EMEA](#)

You will then see the collaborator listed and they can now access your solution.





# Solution ID list

Your Solutions

The Your Solutions Page is the starting point for creating new solutions and managing your existing solutions. To see all versions outside of the last saved version select "All Versions" to be taken to the version history page. Use Column Preferences menu to adjust optional columns.

[Create New Solution](#)

Column Preferences

Viewing 1 - 10 of 16 | < 1 2 > | 10 items per page ▼

Deal Id	Solution Group	Solution Name	Solution ID		Last Edited	List price *	Company Name
4151480	General	Partner demo- (1)	25498.3	All Versions	08/02/2013	£109,974.96	dfsdf
4151480	General	Partner demo-test	25496.1	All Versions	08/02/2013	£109,974.96	dfsdf
	Template	Demo2 test (1)	25492.1	All Versions	08/02/2013	£38,927.10	
	General	Demo2 test	25383.1	All Versions	08/02/2013	£38,927.10	

When collaborating, the latest version opened and edited will be the version showing in the "Your Solutions" list as long as it has been shared with you and you have included it in your Solution ID list.

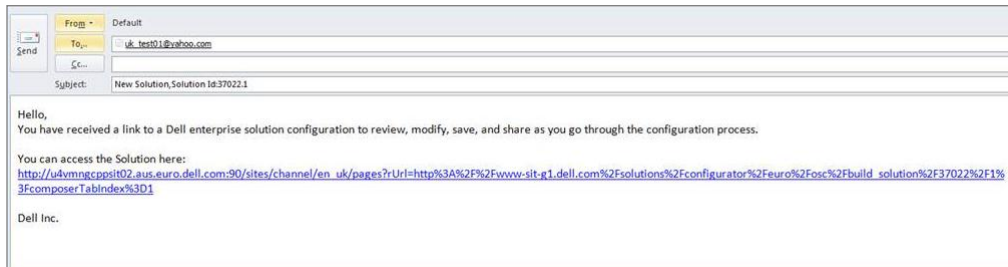


# Share your solution



Print your solution.  
Export to Excel or PDF.

Share your solution via email.



Use the same share process to send to your Dell account team or copy and paste the link into a separate email to your Dell representative.



# Collaboration



- Collaborate with the individuals who are most relevant/helpful to the solution you are creating (e.g., network specialists, etc.).
- Dell.com email addresses will not generate an email to the internal representatives. This is due to the fact that not all internal reps you may be working with have access to PartnerDirect.
- Once a solution has been saved with collaborators, those collaborators will always have access to that version. To remove a collaborator, you must save the solution as a new version and then remove them. They will then no longer be able to view changes to the solutions in the later versions.
- If multiple versions of a solution are being worked on at the same time by different collaborators, those changes are NOT reflected in the latest version. A manual update to incorporate changes will need to be done. To avoid this, make notes on who should edit the next version and/or advise them to make notes in the “Comments” field about what they changed.



# Collaboration, continued

**Solution Configurator**

[Back to Your Solutions](#)

**EMEA demo (1)** [edit name](#) #25505.1 ☐ Include in Your Solutions

[EMEA](#) Last Modified 08/02/2013 by UK Tester 1

[Print](#) [Export](#)

**Step 1:** Collaborators will need to choose “Include” in “Your Solutions” to start modifying a solution.

[Back to Your Solutions](#) [Other Versions](#)

**EMEA demo (1)** [edit name](#) #25505.1 ☒ Include in Your Solutions

[EMEA](#) Last Modified 08/02/2013 by UK Tester 1

[Save As](#) [Print](#) [Export](#)

**Step 2:** Click on “Save As”.

**Note:** There is no “Save As” button prior to clicking on “Include” in “Your Solutions”.

[Add Product](#) [Configuration](#) [Description/History](#)

The Description/History allows you to create & edit notes to share with your solutions collaborators. Only the current open Solution Version may be edited.

Version 1

Demo comments

[Submit](#)

Comments will be imperative to collaboration.



# Collaboration, continued

## Save As

☒ New Version  
☐ New Solution

Solution Name

Solution Group

Description (Optional) 

changing qty on servers

**Step 3:** Save as "New Version". Enter a description and click "Save As".

**Note:** Selecting "New Solution" will drop all association with previous versions. You will want to edit the "Solution Name" and "Group Name" to be relevant to your new solution.

[Back to Your Solutions](#) [Other Versions](#)

**EMEA demo (1)** [edit name](#) #25505.2

[EMEA](#) Last Modified 08/02/2013 by Joanna Norling

Save Save As Print Export Share

You can now see the new version.



# Version history

Your Version History

[Back to Your Solutions](#)

**EMEA demo (1)**

#25505

Owner  
UK Tester 1

Collaborators  
Joanna Norling

Deal Company/Id#

Created  
08/02/2013

Solution Group  
[EMEA](#)

All versions of a Solution that you have saved are accessible from this page. Versions may be expanded to see notes and comments in the description field by selecting the arrow next to the version number. Solution details are on the left side of the page. You can add or remove collaborators to share the Solution under the collaborators section.

Viewing 1 - 2 of 2 | < 1 > | 10 items per page ▼

Version	Last Edited ▼	List price *	Solution Version Creator
▲ 2	08/02/2013	£70,177.86	Joanna Norling
changing qty on servers			
▲ 1	08/02/2013	£70,177.86	UK Tester 1

Viewing 1 - 2 of 2 | < 1 > | 10 items per page ▼

- Identify the originator.
- See all versions and who created those versions.
- See comments added per version.



# Default naming conventions

<input type="checkbox"/>	Category	Product
▼ <input type="checkbox"/>	Server	PowerEdge R620 email [1] Split

Deal Id	Solution Group	Solution Name
4151480	Solutions Configurator	Demo
4151480	EMEA	EMEA demo (1)
	template	EMEA demo

- Brackets around a number indicate that a product has been split from a previous configuration within the solution.
- Parentheses around a number next to the product name indicate if you have added the same product more than once.
- Parentheses appear around a number next to a solution name when you use the "Save As New" function.
- No brackets or parentheses indicate that these were the original products added to the solution prior to saving and creating a Solution ID.



# Deal registration

Solution Configurator

[Back to Your Solutions](#) [Other Versions](#)

**EMEA demo (1)** [edit name](#) #25505.1  
EMEA Last Modified 08/02/2013 by UK Tester 1

[Save](#) [Save As](#) [Print](#) [Export](#) [Share](#) [Add Collaborator](#) [Contact Dell](#) [Associate with Deal >](#)

[Add Product](#) [Configuration](#) [Description/History](#)

Viewing 1 - 4 of 4 [Column Preferences](#) 10 items per page

<input type="checkbox"/>	Category	Product	Default Name	Quantity	Unit Price
<input type="checkbox"/>	Server	PowerEdge R620 email [1]	Split PowerEdge R620	<input type="text" value="2"/> <a href="#">update</a>	£6,122.00
<input type="checkbox"/>	Server	PowerEdge R620 email	Split PowerEdge R620	<input type="text" value="1"/> <a href="#">update</a>	£6,474.00
<input type="checkbox"/>	EthernetRackSwitch	Force10 S60	Split Force10 S60	<input type="text" value="1"/> <a href="#">update</a>	£11,662.76
<input type="checkbox"/>	EqualLogic	EqualLogic PS6100S RACK	Split EqualLogic PS6100S RACK	<input type="text" value="1"/> <a href="#">update</a>	£39,797.10

**Step 1:** Click on “Associate with Deal”.

## Associate with Deal

Register a new Deal, or associate this Solution ID with an existing Deal.

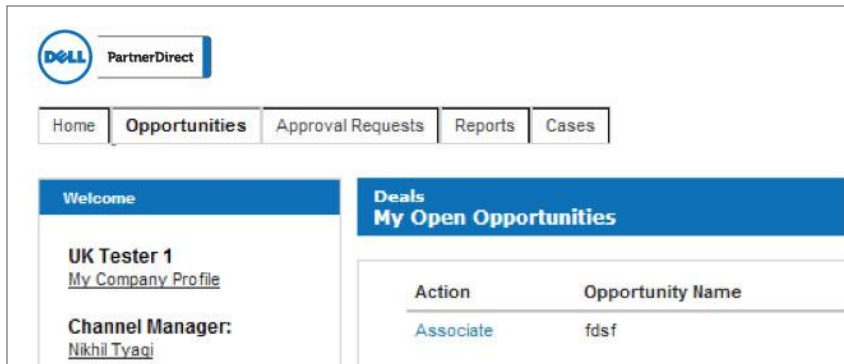
[New Deal](#) [Existing Deal](#)

**Step 2:** Choose “New Deal” or “Existing Deal”.





# Deal registration, continued



**Deals**  
**My Open Opportunities**

Action	Opportunity Name
<a href="#">Associate</a>	fdsf

Registration Information (Read Only - Automatically Populated)			
Deal ID	4151480		
Partner Account	UK Test Company		
Opportunity Owner	UK Tester 1 <a href="#">[Change]</a>		
OSC Solution ID (Do Not Edit)			
Created By	UK Tester 1, 12/04/2012 09:51		
Actions			
Action	Solution Number	OSC Solution ID	Associated Date
	<a href="#">S0000000324</a>	25505.1	08/02/2013

**Step 3:** Click on the deal you would like to associate with your Solution ID or complete the "New" form.

Simply closing the screen will complete the process.

You will now see the Deal ID and its associated Solution ID.

- Only choose "Submit for Approval" if you are making changes to the deal registration such as product changes, etc.
- Not all Partners will have access to register a deal, only those assigned by their company to do so.
- You will need to manually add the Solution ID if you start your deal registration from PartnerDirect.



# Support

## Solution Configurator

[Back to Your Solutions](#) [Other Versions](#)

**EMEA demo (1)** [edit name](#) #25505.1

[EMEA](#) Last Modified 08/02/2013 by UK Tester 1

List price \*  
**£70,177.86**

 Save  Save As  Print  Export  Share  Add Collaborator

[Contact Dell](#)

[Associate with Deal >](#)

- Click on the “Contact Dell” button to route your inquiries to a support team within your region.
- **Note:** “Contact Dell” will not route to your Dell representative. It will route through a support team and depending on the inquiry it will be routed to the best person to address.
- For technical specification assistance, please send a request directly to your sales team.

