Cisco Commerce

Software Subscriptions and Services (CCW-R)

1-Tier Partner User Guide

Contents

1 Introduction

This user guide provides detailed instructions for using Cisco Commerce to manage software subscriptions and services renewals. It includes instructions for initiating renewal quotes, managing renewals through the Quote Manager, and reviewing discounts and pricing information on the renewal quotes.

> **PRO TIP**   Review your user profile before using Software Subscriptions and Services in Cisco Commerce. See the document list below for how to ensure your user profile is set up correctly.

For more details on basic and complex quoting and other existing functionalities in the software subscriptions and services tool in Cisco Commerce, refer to the following links-

Document	Description
Getting Started with Cisco Commerce (English only)	Review Chapter 5 (Personalizing and Setting Preferences) before you begin using Cisco Commerce.
Job Aid: Getting Access to Cisco Commerce (English only)	
Landing Page Guide	A detailed guide to the landing page of CCW-R.
QRG: Open a Case	Step-by-Step instructions on how to open a case to get assistance from Cisco. If you need to add a Bill-To ID to your CPR profile, look here.
Job Aid: Contract Management	Detailed instructions on how to manage contracts.
Job Aid: Takeovers	Detailed instructions on how to create a takeover quote.
QRG: Creating and Managing Renewal Quotes	Overview for creating and managing a renewal quote.
QRG: Export Quote	A 1-page document on how to export your quote.
QRG: Federal Quoting and Ordering	How to apply U.S. Federal government pricing and taxation to a quote.
QRG: Working With Multiple Service Attachments	A guide to making minor line edits for MSA enabled offers.
QRG: Share Quote	A 1-page document on how to share your quote, when necessary.
QRG: Searching, Filtering, and Sorting Renewal Quote	Get details on how to search for, filter, and sort your renewal opportunities.
QRG: Applying Deal ID to a Quote	How to apply a Deal ID to a quote.
QRG: Co-Terming and End Date Alignment	A quick reference guide on how to Co-Term and align end dates.
User Guide: Smart Accounts in Software Subscriptions and Services	A detailed walk through of Smart Accounts in Software Subscriptions and Services
QRG: Quote Upload	How to upload a quote from a spreadsheet.
QRG: Activity Logs	How to see activity logs on quotes.

1.1 Software Subscriptions and Services Overview

Within the Services and Subscriptions area of Cisco Commerce, partners and distributors can view upcoming renewal opportunities (based on login and account permissions), can manage and renew technical services and software subscriptions, and add compatible lines to existing contracts.
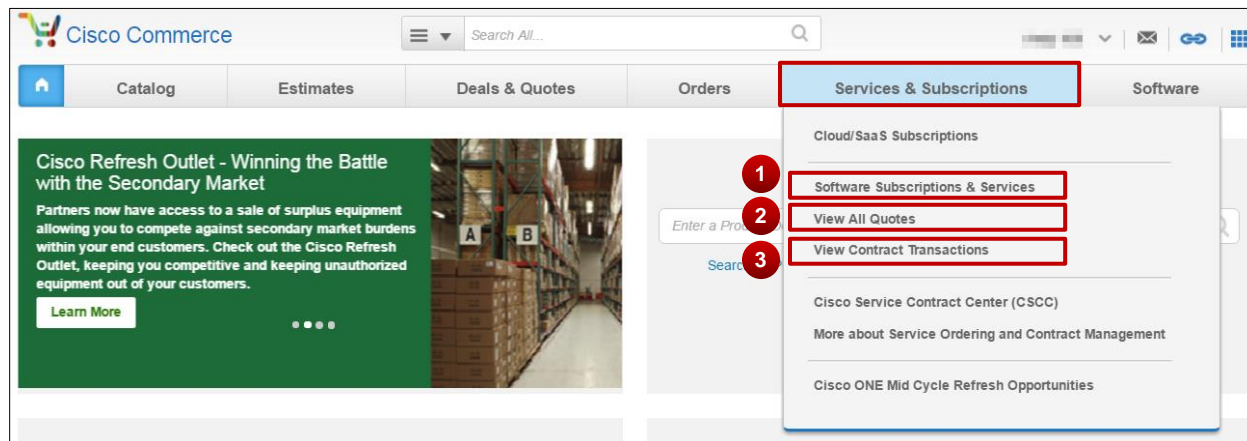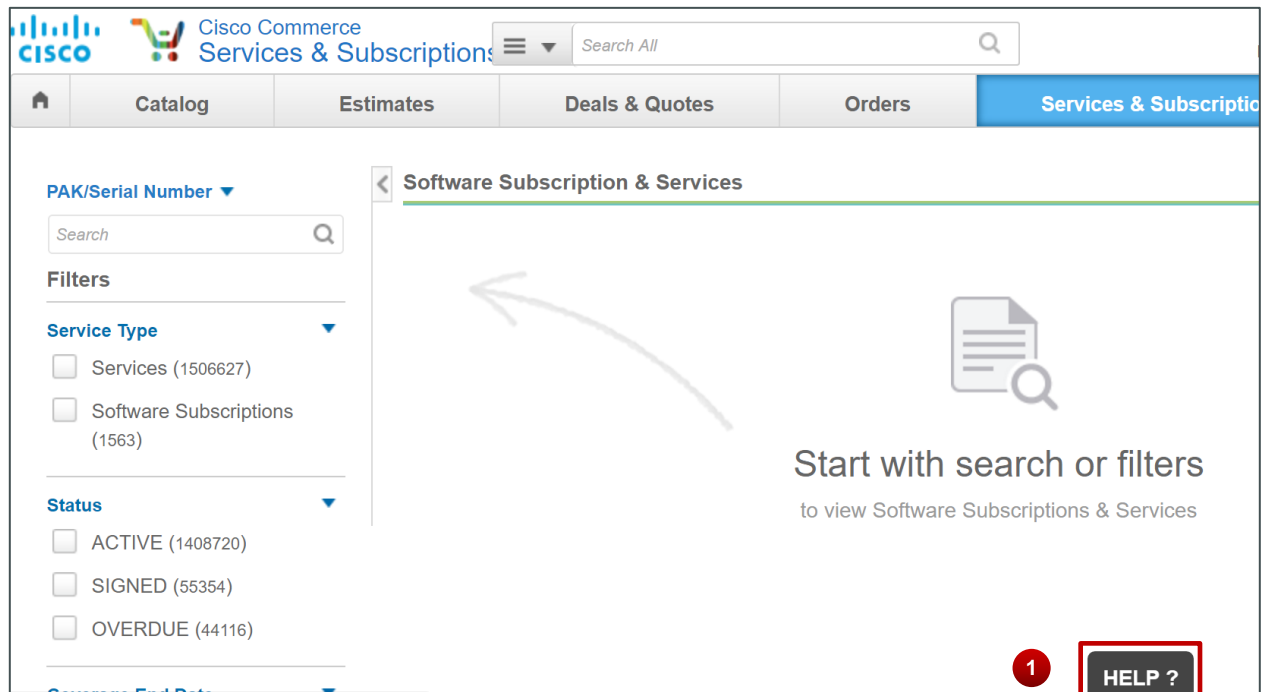

1. Click on the <u>Software Subscriptions and Services</u> link to:
   - View information about your active overdue and upcoming software subscriptions and services (based on your login and account permissions).
   - Search and filter your current subscriptions and services.
   - Initiate and submit quotes.
2. The <u>View All Quotes</u> link takes you to the quote manager. See section <u>0</u> for more on how to manage your quotes.
3. The <u>View Contract Transactions</u> link is discussed in the <u>Contract Administration Job Aid.</u>
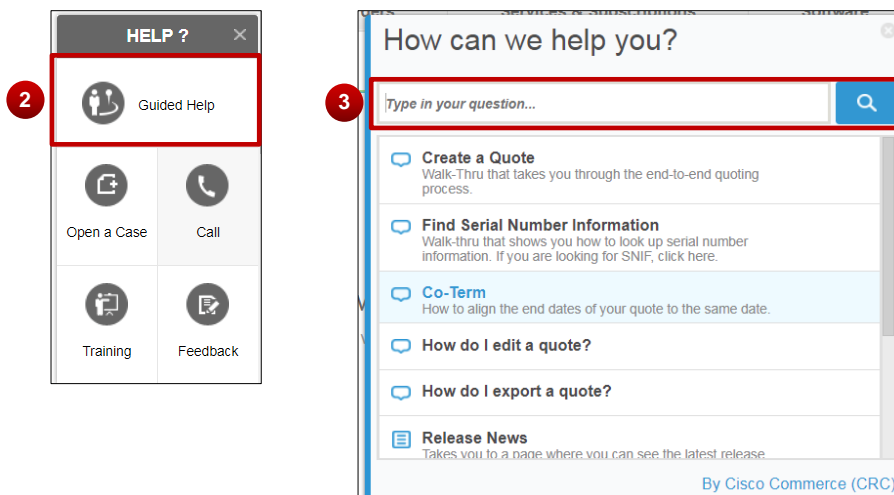
1.2 Guided Help

If you need help, try our guided help to find answers before searching Operations Exchange or Opening a Case. The guided help is an embedded tool in Cisco Commerce where you can find answers to your questions with either quick links to training documents or detailed walkthroughs of common processes. To access it:

1. Click the "HELP?" tab at the bottom of your screen.

2. Select Guided Help from the menu that pops up.
3. Enter your question in the search bar and suggested solutions will appear.

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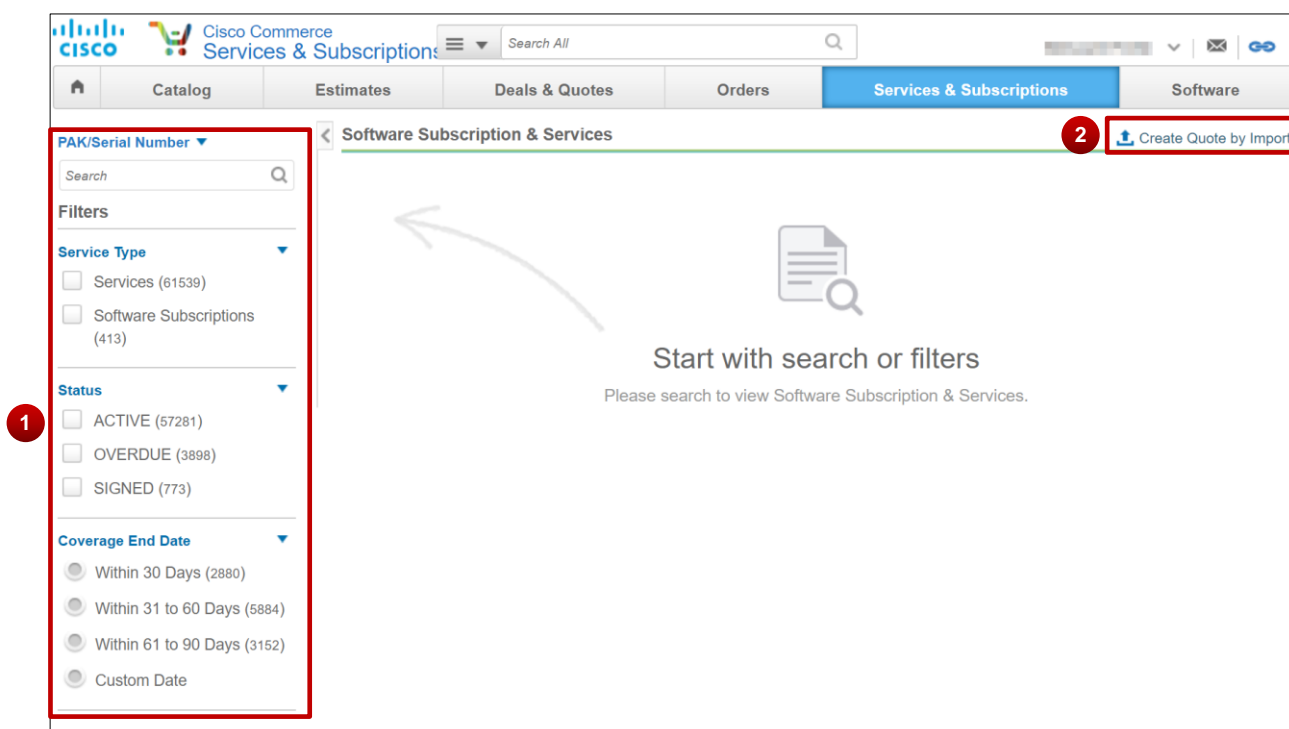## 2 Software Subscriptions and Services Landing Page

The Software Services and Subscriptions landing page displays service and subscription details in a view you can customize, enabling you to find the lines you want to select quickly and easily.

2.1 Landing Page Basics

For a detailed guide to the Landing Page, see the Landing Page Guide.

When you first reach the landing page, you will only see the filters on the left. There are two ways to get started with your quote:

1. Search or select any filter options to see your items.
2. Create a quote by importing a file. See the Create Quote By Import Quick Reference Guide for more information.

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There are three main sections visible on the page.

1. A <u>Search box</u>.
2. A <u>filter bar</u>.
3. The <u>status area</u>, showing search filters chosen, downloadable results, and next steps.
4. The <u>search results area</u>, displayed based on the searches and filters selected.

For more information on the Landing Page, see the <u>Landing Page Guide</u>.

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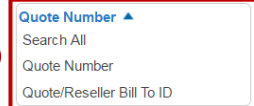
2.2   Managing Your Quotes

You can review, monitor, and view the status of your quotes by clicking on the <u>View All Quotes</u> link in the Cisco Commerce toolbar at the top of the page.

2.2.1   View Software Service Quotes

1. A drop-down menu allows you to choose the quote attribute for your search. The default attribute is **Quote Number.** Choose **Search All** to search by any field on the quote header. <u>Click here</u> to learn more about the quote header.

2. Apply filters as desired to find the quote you are looking for. If you do not see an option, there are no quotes satisfying that criteria. Select **My Quotes** to view only those quotes you have created. **My Quotes** and **Last 30 Days** will be selected by default.

3. Your active filters will display above the results. Click the trashcan icon to remove a filter, or Clear All to remove all filters.

4. This toolbar allows you to:
   a. **Export** a quote (see the <u>Export Quote QRG</u>).
   b. **Clone** a single selected quote. You will be asked for a name for the copied quote and be taken to the <u>View Quote</u> page.
   c. **Delete** a quote, as described below.

5. Click on a quote to view its details or proceed to purchase.
   - If you select a valid quote, you will navigate to the <u>Review and Submit tab.</u>
   - If you select an invalid quote, you go to the <u>Items tab</u>, where you can edit the quote.

Note: You can only edit quotes with a status of **Valid** or **Invalid.** You will not be able to edit quotes with a status of **Order Submitted**, **Order in Progress, Conversion in Progress,** or **Conversion Failed**. You will only be able to view those quotes in a read-only mode.

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3 Software Subscriptions and Services Quotes

3.1 Selecting Lines for Renewal

The landing page allows you to select eligible line items and proceed to quoting.

1. Select the items you wish to renew and click **Create Quote** to proceed to quoting. Users may select line items as follows:

   a. The header checkbox either selects all items on this page or all items on all pages.

   b. The dropdown gives the option to select all on this page or across all pages. You can only select on all pages if results are less than 100,000.
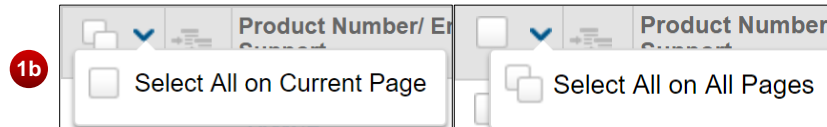
   c. Individual items are selected/deselected with the checkbox next to the item *except* when selecting items across all pages.

   d. If you have minor items displayed, and use select all, the minor items will be replaced by their major items and those items will be selected.

2. The line items that are non-orderable, whose last date of support has passed, or that cannot be quoted for any other reason, appear in gray and are not selectable for renewal quote creation. Hover over the grayed out checkboxes for the reason why the product lines are not selectable.

   Note: You can renew software subscription line items that are expired or terminated.

3. If you select more items than the system currently supports, you will see this message. Select fewer items and try again.
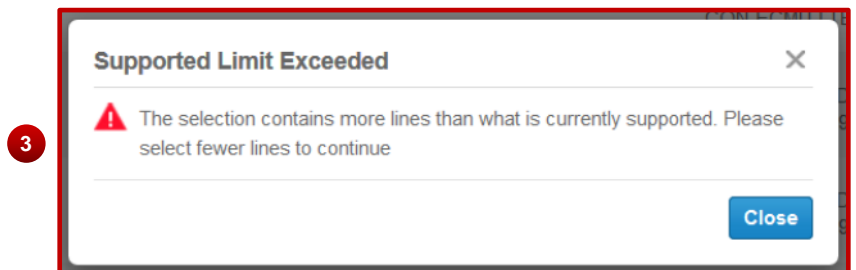
   Note: You can quote up to 30,000 major lines.

4. If you select a line for renewal that received a recent modification to service level or SKU, you will see an information icon within the quote. Clicking on this icon will display a notification message with all historical order information connected to the current renewal.

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3.2   Initiate Quote and Verify Billing Information

After clicking the **Create Quote** button on the landing page, verify the billing information. If you selected uncovered lines *or lines with different Bill-To IDs*, the Bill-To ID from your user profile will appear here.

1. Review the billing information and edit if needed.
2. Select the intended use of the line item from the drop-down menu.
3. Select the duration of the quote from the drop-down menu.
4. Select the currency of the quote from the drop-down menu.
5. Click **Continue**.

6. During periods of high system demand, you may see this message. If you do, you can continue working on other quotes while your quote processes. Find your quote in the quote manager.

7. While you wait, can view your quote in a read-only status. After a few minutes, you will be able to edit your quote.
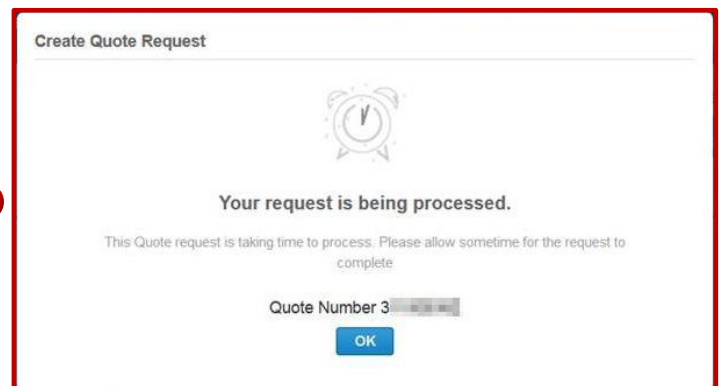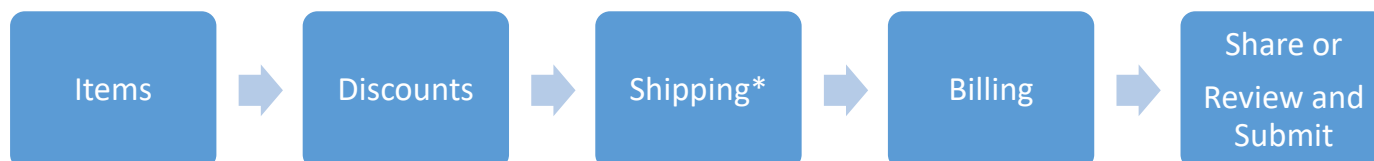
3.3 Quoting Basics

This is the quote view page.

1. On the top is the Quote Header.

2. Information about your quote appears below the Quote Header in a series of tabs. These tabs lead you through a basic flow.

Items ➡ Discounts ➡ Shipping* ➡ Billing ➡ Share or Review and Submit

*Shipping will only appear on those quotes that have subscription line items.

3.3.1   Quote Header

The quote header shows general quote information and is available as you view any of the tabs.

1. The Quote Number is populated in the top left of the header.
2. The status of the quote will appear here.

3. This toolbar allows you to:
    a. **Export** a quote (see the Export Quote QRG).
    b. **Clone** a single selected quote. You will be asked for a name for the copied quote and be taken to the View Quote page.
    c. **Delete** a quote, as described below.
    d. **More** utility options are provided, including viewing an Activity Log for the quote.
4. Click the pencil icon if you wish to update the buy method. Select "Distribution" from the dropdown menu if you wish to function as a reseller for your quote. See the Reseller User Guide for further information on completing your quote as a reseller.

    Note: You may have to revisit the Items and Discounts tabs after you change the buy method to verify information is unchanged.

5. Click the pencil icon to update the quote name.
6. The price protection field specifies how long the net price of your quote is valid. We provide price protection, also known as quote protection, once your quote becomes valid. It will remain until the deal expires, the date expires, or major changes are made to the deal. Price protection works as follows:
    a. Quotes have 60 days of price protection after validation. This protection applies to all fully validated lines. CCW-R protects the net price, which is the list price minus discounts.
    b. The only way to change the price protection date is to change the header. Changing certain header fields (BID, Deal ID, Buy Method, Taxability, Intended Use) resets the price protection date for the quote and updates all line prices to the current price.
    c. The price protection date is shown in the header unless the quote was created before August 14,2017. Those quotes still have price protection for 60 days from the date the quotes were created, it just does not show the date.
    d. Deleting a line will not affect the price protection date or the price on any other lines.

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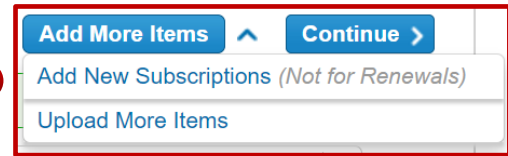Content Authors/Publisher: Cisco Commerce Release Communications (CRC).

e. Editing a line in a way that requires repricing will update that line according to the current price. For example, duration or quantity changes will be priced according to the current price. This only affects the edited line. The price protection date does not change.

f. Editing a line in a way that does not require repricing, like changing the target contract number, will not impact the pricing, nor the price protection date.

g. Adding a line will use the latest price for that line only. The price protection date does not change.

3.4   Quoting: Items Tab

On the items tab of a quote, you can view and filter existing product line items and add new lines.

1. The **Add More Items** button allows you to add more items manually (see section 3.4.1). You may also select the dropdown to have two other options:

   a. Add new subscriptions (except for renewals) individually. See the Add New QRG for more information.

   b. The same way you create a quote. See the Quote Upload QRG for more information.

2. Click the filters icon to display advanced filters, to include any identified errors. See section 3.4.2 for enhanced filtering options.

3. Click here to expand the Product Number, Service/Offer Type, and PAK/Serial Number columns to read or copy the entire contents of each column. Click again to collapse those columns to their original width.

4. When enabled, click here to expand and view all minor lines.

5. Click the **+** icon to view the minor lines on an individual major line.

6. If you select a line for renewal that received a recent modification to service level or SKU, you will see an information icon within the quote. Clicking on this icon will display a notification message with all historical order information connected to the current renewal.

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### 3.4.1 Add Line Items or New Subscriptions to the Quote

Note: For instructions on how to add new subscriptions to your quote, <u>click here to view the "Add New Subscriptions" Quick Reference Guide</u>. Read on to learn how to add additional renewal or new service lines to your quote.
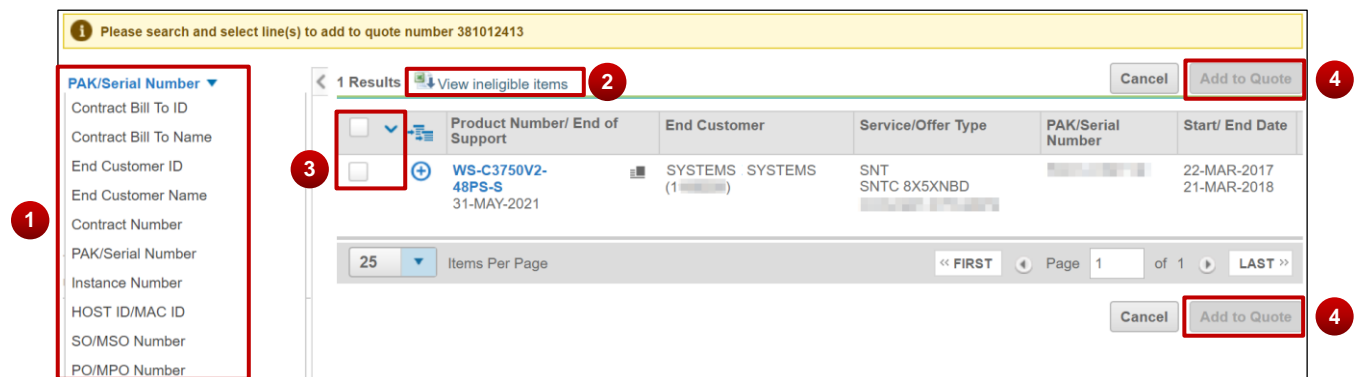
PRO TIP	To make sure a quote can have $0 line items and still be valid, there must be at least one mapped SKU. The $0 items do not need to be mapped to that SKU; it just needs to be in the Quote.

After you create a quote from the landing page, you can add additional lines. Click **Add More Items,** and you will go to a search page where you can choose line items to add to the quote.

1. You can search for line items by selecting and providing the search criteria.
2. If there are ineligible items, you can click **View Ineligible Items** to download a list of items not found in the search or not eligible for quoting. This list includes the reason the items are ineligible for quoting.
3. You may select line items as follows:
   a. The header checkbox either selects all items on this page or all items on all pages.
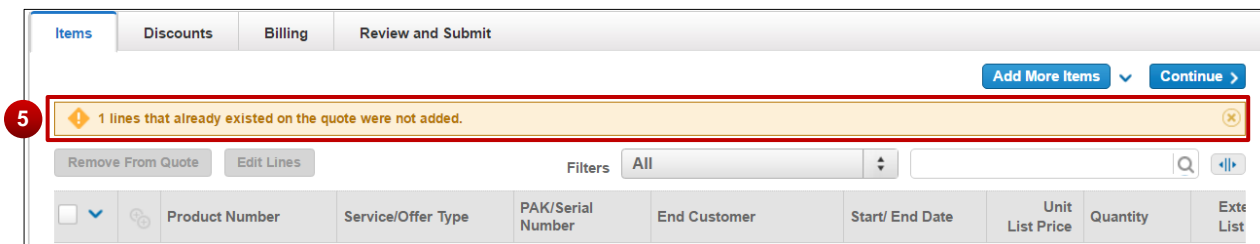   b. The dropdown gives you the option to select all on the current page or across all pages.
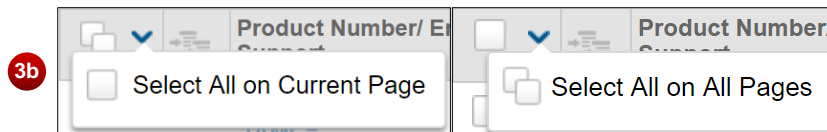
   c. Individual items are selected/deslected with the checkbox next to the item *except* when selecting items across all pages.
   d. If you have minor items displayed, and use select all on *all pages*, the minor items will be replaced by their major items and those items will be selected.
4. The Technical Services (TS) line, if any exist, will be added to the quote.

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5. If you select an already existing line in the quote for addition, the line will not be added and a notification message will display.

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3.4.2   Advanced Filtering and Search Options on a Quote
You can filter your line items in a variety of ways.

1.   Filter a quote by selecting the filter icon to expand or collapse all available options.

Note: The filter icon will turn from blue to red when line items contain errors.

2.   You can expand, collapse, and select these dynamic and static filters, depending on your desired options. Selecting multiple line items, allows you to apply edits all at once more efficiently.

3.   You can also enter your own search criteria to work in conjunction with filtering.

4.   When you search for and add an RMA item to your quote, you will see the replacement line item within the Items Tab. The replacement serial number will appear within the line and a hover over information icon will appear to share the associated RMA data.

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3.4.3   Edit Lines on the Quote

You can edit a line item in a few ways, including editing multiple lines at a time (multi-line edit).

1. Select the edit or ✏ icon.
2. Click the location or 📍 icon to view the end customer details.

3. Click the individual attributes or fields, including quantity.
4. Click the calendar icon to edit the dates. Make sure you choose a date when using the calendar.
5. **Note**: You can set the start date up to 90 days in the past (also known as "Backdating"), and can set the start date up to 90 days in the future. CCW-R does not support service level durations less than 30 days.

3.4.4 Edit Service Level

1. Click the edit icon next to the service level to edit the service level. Depending on the type of service attached, you may see different pop-up windows. For a TS line, the change service pop-up window will appear.

2. Use the drop-down menu to choose your service type, and begin typing to search for available service level choices.

3. For a subscription, clicking the edit icon will navigate you to a different screen to make changes. Click Edit Subscriptions.

PRO TIP	This function is recommended for making quick comparisons only. If you already know how you want to change your subscription, it is faster to use the functions on the items tab, as described on the previous page.

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4. Edit license quantity.
5. Edit start and end dates.
1. Edit duration. Reminder: CCW-R does not support service level durations less than 30 days.

2.

| PRO TIP | Once you change the end date, duration, or quantity for your quote, the service or subscription SKU and list price will update automatically. |

3.4.5 Mid Term Upgrade/Downgrade

A mid-term upgrade/downgrade is when a change in Service Level is made prior to the contract end date.

1. Click the edit icon next to the service level to edit the service level.
2. Upgrade or downgrade the service level based on your preference.
3. Update the start date (and end date if necessary). Reminder: CCW-R does not support service level durations less than 30 days.

You can perform a mid-term upgrade if:

- There is no change of Distributor BID from source contract line
- The quote currency matches the source contract currency
- The quote does not have signed coverage
- The mid-term upgrade does not result in a negative net amount on the quote
- The mid-term upgrade is not applied to takeover lines

3.4.6 Change Contract

1. Click the edit icon alongside the contract to display the change contract window.
2. Enter a specific contract number.
3. Alternatively, you can select an existing contract number from the currently displayed quote using the drop-down menu.

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4. You can also create a new contract. Enter a name to identify line items within the quote on the same new contract.

PRO TIP Select an existing contract whenever possible, and try to avoid creating new contracts.

3.4.7 Co-Terming Services

1. You can align the end date to an existing compatible contract by clicking the Co-Term checkbox. For more information on Co-Term, see the Co-Terming and End Date Alignment Quick Reference Guide.

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3.4.8   Search for an End Customer at Line Item

1. You can search in the editing field with customer name, site ID, city, address, or a combination of these values.

    Note: We are not displaying site IDs that are not appropriate for the Bill-To on the quote. If you cannot find the site ID you are looking for, you may have to create a new site ID.

2. The search results will update as you type. If the desired end customer does not appear, you can create a new site.

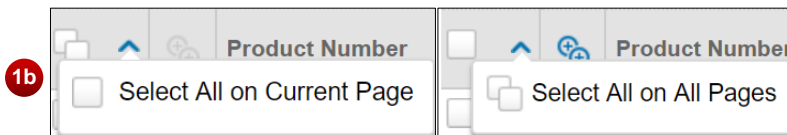3. See the Create Site ID Quick Reference Guide for more details.

    Note: If you see an error that reads, "End Customer is a drop ship site and is not valid for quoting and ordering. Edit the line to select or create a new End Customer site to use," please follow the instructions and change the End Customer site. This error message is intended to prevent ordering errors that have occurred for some customers.

3.4.9   Multi-Line Edit

1. You can also perform multi-line edits. Select multiple lines from one or more pages. To select many items, increase the numbers of items displayed on each page (up to 200).

   a. The header checkbox either selects all items on this page or all items on all pages.

   b. The dropdown gives you the option to select all on the current page or across all pages.

   c. Individual items are selected/deselected with the checkbox next to the item *except* when selecting items across all pages.

   d. If you have minor items displayed, and use select all, the minor items will be replaced by their major items and those items will be selected.

2. Click the **Edit Lines** button to open the edit lines dialog box, shown on the next page. The **Edit Lines** button is enabled when you select two or more lines.

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3. You can change the hardware or software service level. You will be shown a list of eligible service levels for the Bill-To ID.

4. You can align the end date for the selected line items.

5. You can change the end customer.

6. You can update the quantity.

7. Click the contract info checkbox if you want to change the contract. This enables you to
   a. Enter an existing contract number.
   b. Select an existing contract from this quote.
   c. Create a new contract, which enables you to create separate contract groups within your quote. The new contract will be created when the quote is ordered. Choose an existing compatible contract whenever possible, and try to avoid creating new contracts.

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3.4.10 Remove Line Items

1. To remove multiple line items, you can check the desired boxes, click **Remove From Quote** (at top or bottom of selected items)**,** and confirm your deletion.

2. To delete or remove single line items (including minor lines) from the quote, hover over the line and click on the trash can icon.
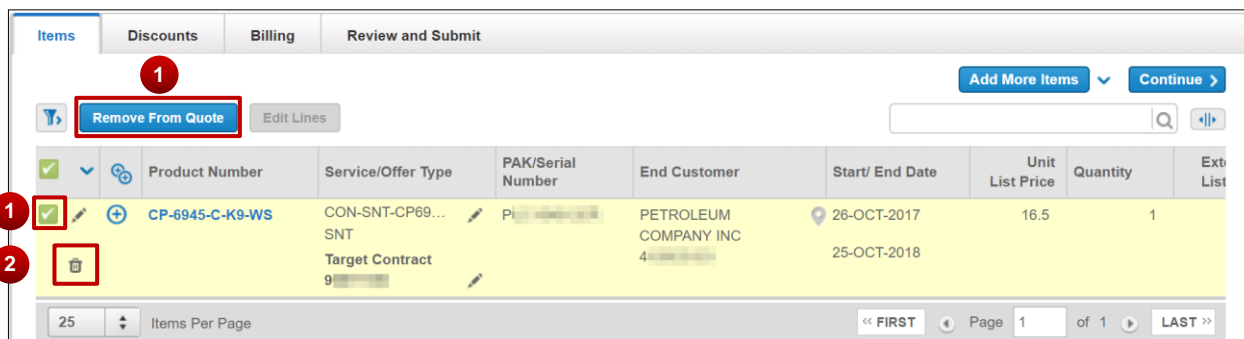
3. If you have selected a minor line with a Last Date of Support (LDOS) error, you will have the option to delete all minor lines in the quote with that error.

4. Click **Delete** to confirm your choice.
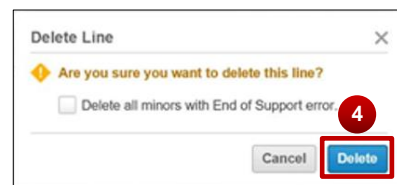
3.4.11 Smart Accounts

You can use Smart Accounts in Software Subscriptions and Services. See the Smart Accounts User Guide to learn more.

3.4.12 Multiple Service Attach

For certain offers you can make independent edits at the minor line level. These offers will be marked with an "MSA" tag. You can find out more in the Multiple Service Attach QRG.

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3.5   Quoting: Discounts Tab

1. You may see information messaging or errors.
2. You can update the intended use and update if needed by clicking on the edit icon.

3.5.1   Entering an Approved Deal ID

Adding a Deal ID is optional. If you have an approved Deal ID, click the edit or pencil icon next to the Deal ID box to see the view shown here. For more information about Deal IDs, see the Applying Deal ID to Quote QRG.

1. Enter your approved Deal ID and click Update.

PRO TIP Line items on the approved Deal ID must match the line items on the quote to apply non-standard discounts. These discounts are non-editable.

3.5.2 View Discount Options

1. You can view discounts in a Summary, Summary by Service Level or Detailed view.

2. The Summary view displays the summary of pricing such as the unit list price, the prorated list price, the extended net price, associated Service Level information, and discounts such as the total of discounts applied on the quote. If there is a Promotion Code it will be displayed (**Note:** If the Code was created before late August 2017, it will not display).

3. The Discount Details view shows the standard discounts such as service level discounts applied on the quote and the multiyear discounts for applicable products on the quote.

4. The Summary by Service Level view shows List Price and Extended Net Price amount, grouped by Service Level for major and minor lines.

3.6 Quoting: Shipping Tab (Subscription Lines Only)

This tab is only present if your quote contains subscription items.

Note: You may see an error that reads, "End Customer is a drop ship site and is not valid for quoting and ordering. Edit the line to select or create a new End Customer site to use." If you see this error, please follow the instructions and change the site ID.

3.6.1 Add Shipping Information to Subscription Lines

1. Search for the shipping address (using Ship-To ID, company name, etc.) to apply a shipping address for all lines.

2. Click the edit icon and search to apply a Ship-To ID to individual lines.

3. Select a Ship-To ID from the results.

4. If you cannot find your desired site, create a new one. See the Create Site ID Quick Reference Guide for more details.

PRO TIP Search for an address before creating a new one. Only create a new site ID if necessary.

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5.   Enter the eDelivery email address here to apply it to all lines.

6.   You can also edit the eDelivery address on individual lines.

PRO TIP   To avoid subscription fulfillment delays, make sure that you enter an accurate email address in this field.

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3.6.2 Add Contact Information for Subscription Lines

1. Click **Add Contact** to add a contact to the shipping address.
2. You can choose an existing contact, or click **Create New Contact**.
3. When finished, click **Apply to All Lines**, and the contact and shipping information will be added to the subscription line items.

3.7   Quoting: Billing Tab

Review the billing information and edit if needed. Changes in billing information will result in the quote being revalidated and may result in errors.

1. Select or change your taxability information. The taxability option on select is validated for accuracy based on the Bill-To ID and install site.

2. Review the Bill-To ID and change if needed.

3.8   Quoting: Share

In Cisco Commerce, you can seamlessly share your quotes. In most cases, your quotes will automatically be accessible to other users from the same partner and in the same global region as you. If you can open, edit, or order the quote, so can your co-worker. See the Quote Share Quick Reference Guide for how to share your quote with another user.

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3.9   Quoting: Review and Submit

It is likely that the **Submit Order** button will be grayed out. You must have a signed Global Commerce Agreement (GCA) and you must be eligible to submit orders before the **Submit Order** Button will be enabled. Please check with your organization's purchasing department before signing a GCA.

1.   If your quote contains errors, the icon corresponding to the tab with the error will appear red. You cannot submit your order until you resolve all errors.
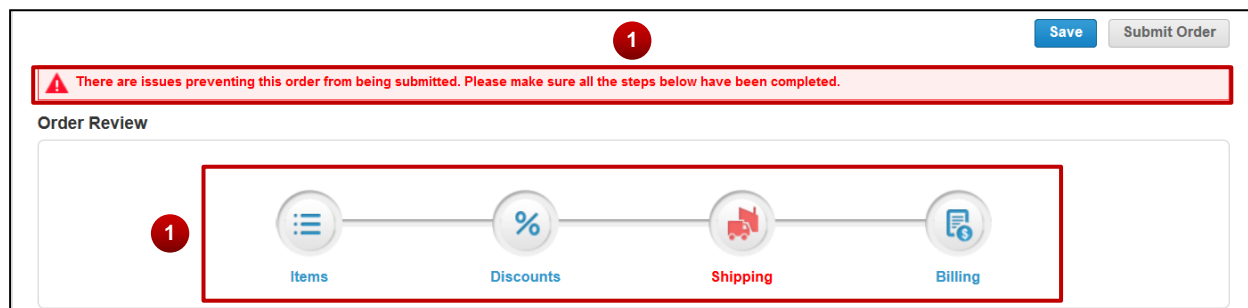
PRO TIP   Clicking on an icon will take you directly to that tab.

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2. You can view and download a sample invoice in either XLSX or CSV format if your quote is in one of the following statuses: Valid, Order In Progress, Order Submitted, Order Booked, Conversion in Progress, Conversion Failed, Conversion Revalidated or Order Complete.

3. Enter your purchase order and/or partner reference information.

4. Enter emails of others who should receive order completion notifications. You do not have to include your own email address here. You may only do this for 1-Tier quotes.

5. Enter the email address of your end customer to provide them easy access to useful information. Once the quote is converted, the email notification will be sent.
   Note: Do not use this feature for quotes that include multiple end customers. The same notification with all the contracts will be sent to all the emails specified.

6. Click **Save**.

7. Click **Submit Order**.

| PRO TIP | If you are not immediately submitting your order, you must click **save** to capture any additions or changes to the purchase order or partner reference. |

3.9.1 Order Confirmation Messages

We send two email messages confirming your order.

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We send the **Order Acknowledgement** message to whoever submitted the order, no matter who created it, when you click **Submit Order** and the status changes to "Order Submitted."

When your quote status changes to "Order Complete," we send the **Order Confirmation** message to whoever submitted the order, whoever created the quote, and to any email addresses added on the Review and Submit tab. Your order confirmation message will have a link to an Order Completion Report. Anyone with access to that quote can download the report from the link provided in the message.

4   Glossary

Term	Definition
Active (Contract Status)	A contract that is current and enabled for TAC support.
Expired (Contract Status)	An expired contract status is 30 or more days after the contract ended. No TAC support.
Overdue (Contract Status)	A contract that has ended but is within the 30-day grace period and enabled for TAC support.
Signed **(Contract Status)**	A contract that has not started.
Terminated (Contract Status)	A contract that has been terminated on request from Partner/Customer. No TAC support.
Co-Term	Aligning the end date of a line in the quote with the end date of an existing contract. Also referred to as End-Date Alignment.
GU ID (or GU Name)	Global Unique Identifier (The GU ID is the data point used in Cisco's records to associate all branches of a corporation to a common, overarching entity)
Host ID	Host ID is an unique identifier for a particular device. For a SW Subscription line the Host/Mac ID is the HW device on which the subscription is installed and registered with Cisco via SWIFT portal.
Instance Number	Unique identifier for a Product in Install Base record can be used similar to serial numbers and will apply to both Serialized and Non-Serialized products
MAC ID	Media Access Control ID is a unique identifier assigned to network interfaces for communications on the physical network segment.
PAK	Product Authorization Key
PO Number	Purchase Order Number
Product Number	The unique name Cisco uses to identify the product also referenced to as Product SKU or License name for subscriptions
Service Choice	Cisco covers many levels of service. This specifies which level is being obtained
SKU	Stock-Keeping Unit. A unique identifier for each distinct product and service that can be purchased in business.
SO Number	Sales Order Number