



Software Subscriptions and Services (CCW-R)

Reseller User Guide



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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.

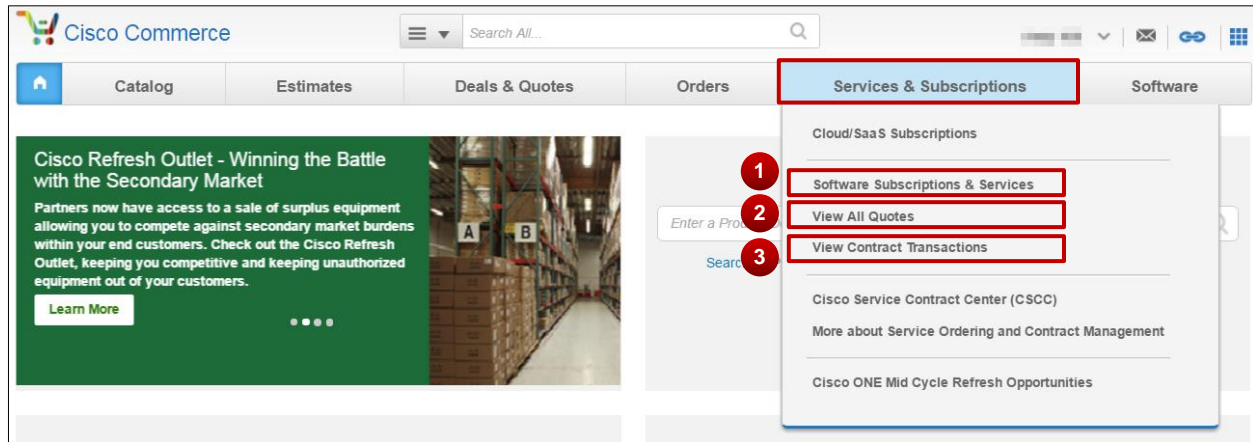
For more details on basic and complex quoting and other existing functionalities in the software subscriptions and services tool in Cisco Commerce, refer to the following links:

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, resellers 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 [Software Subscriptions and Services](#) 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 [View All Quotes](#) link takes you to the quote manager. See the [Quote Manager](#) section for more on how to manage your quotes.

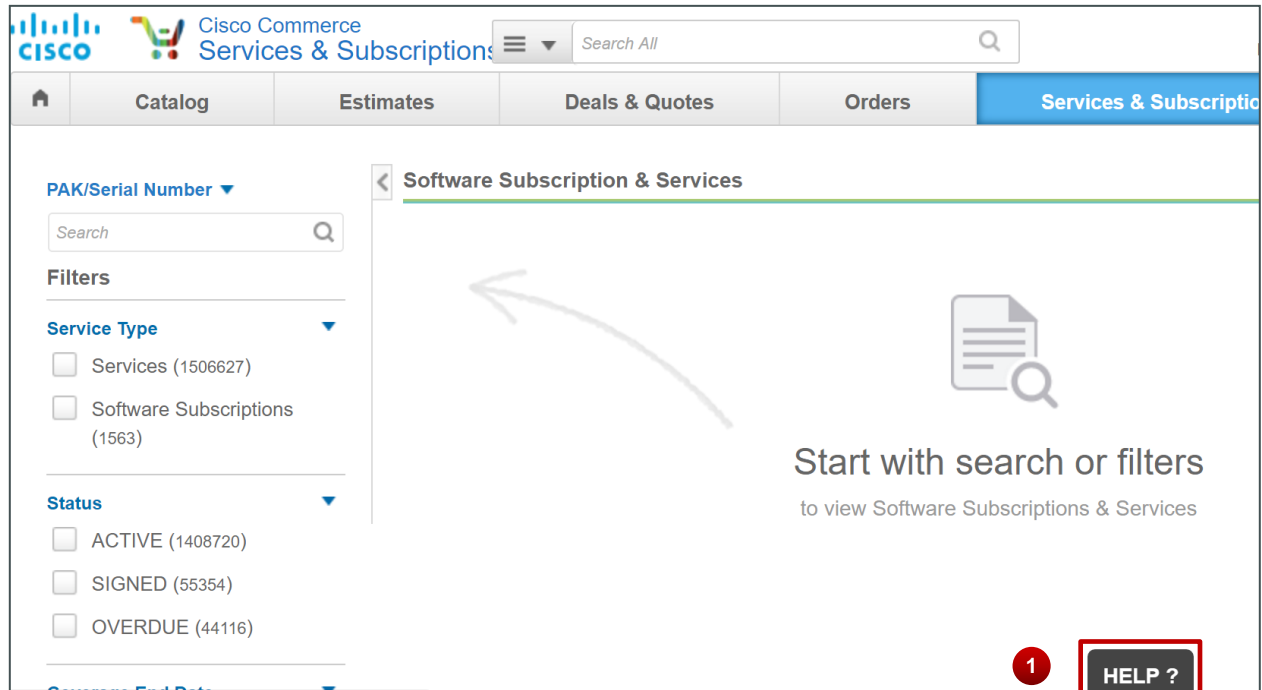
The [View Contract Transactions](#) link is discussed in the [Contract Administration Job Aid](#).



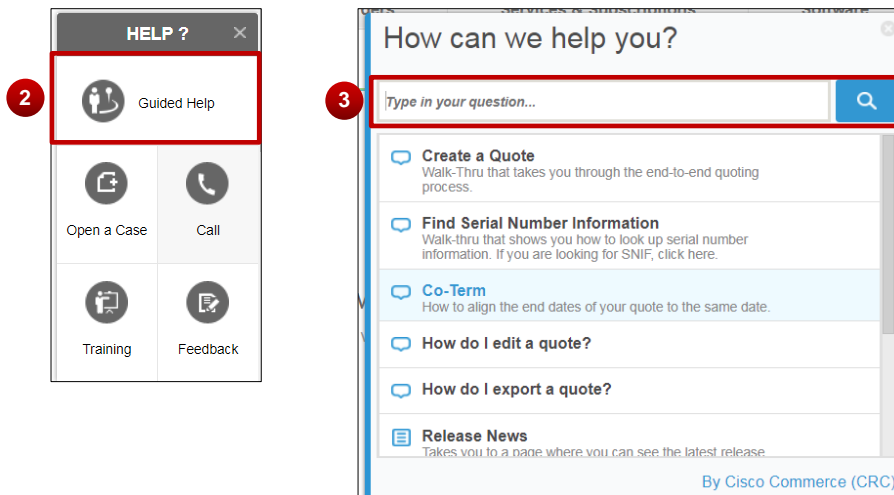
1.2 Guided Help

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.





2 Software Services and Subscriptions Landing Page

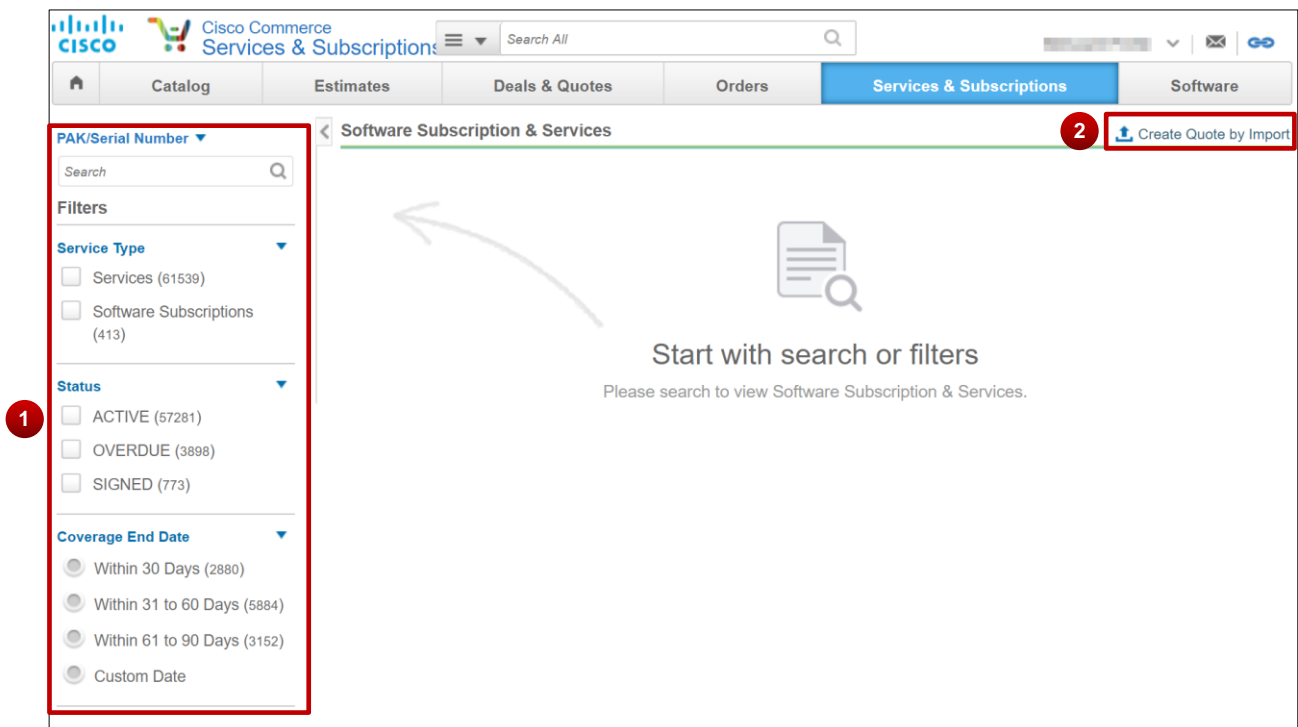
The Software Services and Subscriptions landing page displays service and subscription details in a view you can customize, enabling you to find the lines you want to select quickly and easily.

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.





There are three main sections visible on the page.

The screenshot shows the Cisco Commerce Services & Subscriptions interface. The top navigation bar includes links for Catalog, Estimates, Deals & Quotes, Orders, Services & Subscriptions (highlighted), and Software. A search bar is located at the top right. The main content area is titled 'Software Subscription & Services' and shows 67660 results. On the left, there is a 'Filters' sidebar with various filter options. The main table displays a list of subscriptions with columns for Product Number/ End of Support, End Customer, Service/Offer Type, PAK/Serial Number, and Start/ End Date. Numbered callouts are present: 1 points to the search bar, 2 points to the filters sidebar, 3 points to the 'Services & Subscriptions' tab, and 4 points to the search results table.

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

For more information on the Landing Page, see the [Landing Page Guide](#).

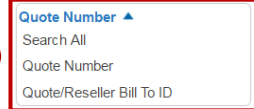


2.2 Managing Your Quotes

You can review, monitor, and view the status of your quotes by clicking on the [View All Quotes](#) 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. [Click here](#) to learn more about the quote header.



Software Subscriptions & Service Quotes

150,000 Results for "..." (Exceeded maximum of 100,000 results. Refine your search to have all the filter and sort capabilities)"

My Quotes Last Modified Date Last 30 Days Clear All

Export Email Share Clone Delete Tags

Quote Number	End Customer	Quote Bill To	Reseller Bill To	Status	Quote Name	Created By
2	WATER CORPORATION (8...), US	WORLD TECHNOLOGY (1...)	AFRICA (UK) LIMITED	VALID	Q3FY13 Prod Ver Final Quote	
2	WATER CORPORATION (8...), US View More	DIRECT INC (8...)	--	INVALID	QFY13 Prod Ver Partner Search Quote Reseller Created Quote	
2	WATER CORPORATION (8...), US	WORLD TECHNOLOGY (1...)	TECH CORPORATION (8...)	VALID	Q3FY13 Prod Ver Service Orderability Quote	
3	WATER CORPORATION (8...), US View More	DIRECT INC (8...)	--	INVALID	Q3FY13 Prod Ver Final Quote	

2. Apply filters as desired to find the quote you are looking for. If you don't 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 [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.
5. Click on a quote to view its details or proceed to purchase.
 - If you select a valid quote, you will navigate to the [Review and Submit](#) tab.
 - If you select an invalid quote, you go to the [Items](#) tab, 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.

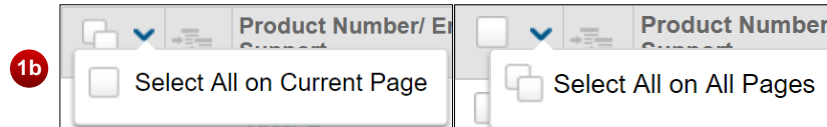


3 Software Subscriptions and Services Quotes

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.

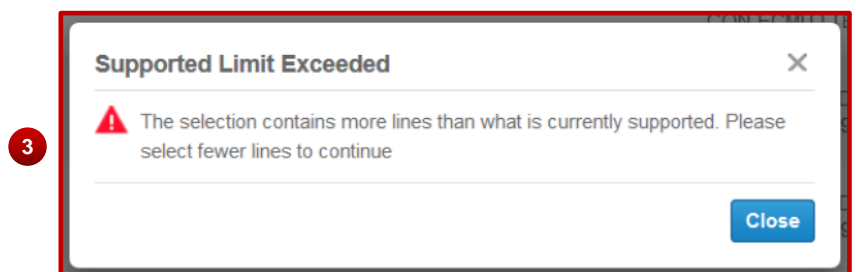


- c. Individual items are selected/deselected with the checkbox next to the item *except* when selecting items across all pages.
 - d. If you have minor items displayed, and use select all, the minor items will be replaced by their major items and those items will be selected.
2. The line items that 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.

<div> Export Print Email Tags </div> <div> 1 Create Quote > </div>							
1 <input type="checkbox"/>	Product Number/ End of Support	End Customer	Service/ Offer Type	PAK/Serial Number	Start/ End Date	Contract Number	
<input checked="" type="checkbox"/>	SMA-BMGT-LIC= 22-APR-2015	SYSTEMS (4)	ISV1 UC ISV L1 + L2 24X7 CON-ISV1-VSXEPL3A		NOV-2012 NOV-2015	9	ACTIVE
2 <input type="checkbox"/>	SMA-CMGT-LIC= 13-NOV-2016	BANK (2)	ECMU SWSS UPGRADES CON-ECMU-UCFND5 5		28-NOV-2012 27-NOV-2015	9	SIGNED
<input type="checkbox"/>	SMA-DMGT-LIC= 07-JUN-2017	SYSTEMS (4)	ISV1 UC ISV L1 + L2 24X7 CON-ISV1-VSXEPL3A		NOV-2012 NOV-2015	9	ACTIVE

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.



If you select a line for renewal that received a recent system modification to service level or SKU, you will see an information icon within the quote, a notification message will display, and all historical order information will connect to current renewal.

The screenshot displays the 'Items' tab of a quote interface. A red box highlights a notification message that appears when a line is selected for renewal with a recent system modification. The message states: 'Information on this Line' followed by 'Service Level' and 'System has auto adjusted subscription for the licence based on current availability'. Below the notification, a table lists the items in the quote. The first item is highlighted in yellow and includes a red circle with the number '4' and an information icon. The table columns are: Customer, Start/ End Date, Unit List Price, Quantity, and Ext. List Price. The item details are: AMPMI, Target Contract 9, 19-MAR-2019 to 18-MAR-2020, 1285, 2, and 2. Below the table, there is a 'Smart Account: --' field, a pagination control showing '25' items per page, and buttons for 'Remove From Quote', 'Edit Lines', and 'Assign Smart Account'.

Customer	Start/ End Date	Unit List Price	Quantity	Ext. List Price
AMPMI	19-MAR-2019 to 18-MAR-2020	1285	2	2



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. Use the drop down menu to choose the Reseller ID if multiple options are available.
2. Click on the edit or pencil icon to edit the Bill-To ID.
3. Use the drop down menu to select the distributor if multiple options are available. Selecting a distributor is required to proceed.

4. Click here to add a contact to the quote. See section [3.2.1, Add Contact](#), for how to add a contact.
5. The intended use will be “Resale” and is not editable.
6. Select the duration of the quote.
7. Click **Continue** to proceed.
8. 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](#).



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

3.2.1 Add Contact

Click the large “plus” symbol to add a contact. This process is identical in the shipping section and the billing section.

1. A pop-up window will appear. You can choose an existing contact, or click **Create New Contact**.
2. Click **Use Selected Contact** to add that contact.

8

Quote request is submitted for processing. Quote will be read only until the quote processing is completed.

These are the Contacts associated with the following address

Address	MARKET STORE 456 3004 BRIDGE RD - STORE #456 UMMING GA 32835 US
---------	--

Contacts

First Name	Last Name	Email Address	Phone Number
<input checked="" type="radio"/> John	Doe	jdoe@website.com	1234567890

5

<< FIRST Page 1 of 1 LAST >>

Can 2 Use Selected Contact



3.3 Quoting Basics

This is the quote view page.

1. On the top is the Quote Header.

QUOTE NUMBER	BUY METHOD	INVOICE SKU	CREATED BY	SMART ACCOUNT
Takeover	Distribution	Dollar Adjustable SKU	On 20-Jun-2017	Assign Smart Account
QUOTE NAME	STATUS	PRICE PROTECTION ENDS	LAST UPDATED BY	
OTHERTEST	Valid		On 14-Jul-2017	

Product Number	Service/Offer Type	PAK/Serial Number	End Customer	Start/ End Date	Unit List Price	Quantity	Ext List
ASA-UC-24=	CON-SNT-ASA... SNT Target Contract			28-JAN-2018 24-JUN-2021	1535.08	1	17

Smart Account: --

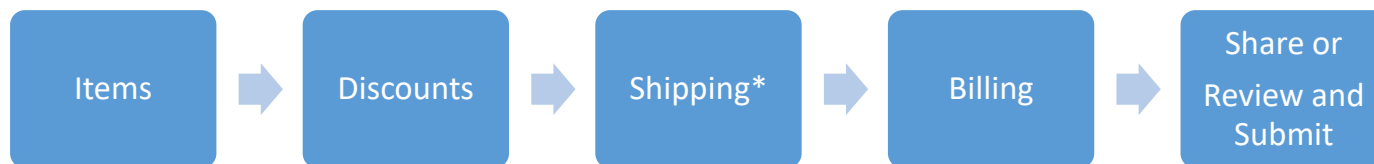
25 Items Per Page

Page 1 of 1

Total Extended List Price: 1742.56

All Prices shown in AUD

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



*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.

Export Share Clone Cancel Delete				
QUOTE NUMBER [Redacted] Takeover	BUY METHOD Distribution	INVOICE SKU Dollar Adjustable SKU	CREATED BY [Redacted] On 20-Jun-2017	SMART ACCOUNT Assign Smart Account
QUOTE NAME OTHERTEST	STATUS Valid	PRICE PROTECTION ENDS	LAST UPDATED BY [Redacted] On 14-Jul-2017	
Items Discounts Billing Review and Submit				

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

Export Share Clone Delete More				
QUOTE NUMBER [Redacted] Non Standard	BUY METHOD Cisco	CREATED BY [Redacted] On 30-SEP-2013	SMART ACCOUNT Assign Smart Account	
QUOTE NAME [Redacted]	STATUS Invalid	PRICE PROTECTION ENDS 01-JAN-2017	LAST UPDATED BY [Redacted] On 30-SEP-2013	

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 to update the quote name. The Invoice SKU will appear by default as Dollar Adjustable for APJC distributors and Fixed Dollar for all others. Using the pencil icon, you can manually select Fixed Dollar, Enterprise, or Dollar Adjustable.
5. 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.
 - 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.
6. 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.

Export Share Clone Cancel Delete				
QUOTE NUMBER Takeover	BUY METHOD Distribution	INVOICE SKU Dollar Adjustable SKU Fixed Dollar SKU Dollar Adjustable SKU Enterprise SKU	CREATED BY On 20-Jun-2017	SMART ACCOUNT Assign Smart Account
QUOTE NAME OTHERTEST	STATUS Valid		LAST UPDATED BY On 14-Jul-2017	
Items Discounts Billing Review and Submit				

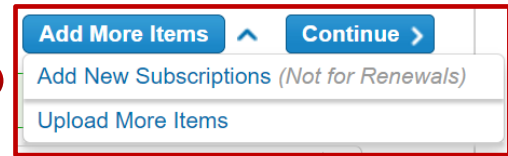
Note: You may have to revisit the Items and Discounts tabs after you change the buy method to verify information is unchanged.



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.

- 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:
 - Add new subscriptions (except for renewals) individually. See the [Add New QRG](#) for more information.
 - The same way you create a quote. See the [Quote Upload QRG](#) for more information.
- Click the filters icon to display advanced filters, to include any identified errors. See section [3.4.2](#) for enhanced filtering options.
- 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.
- When enabled, click here to expand and view all minor lines.
- Click the + icon to view the minor lines on an individual major line.





- 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.

The screenshot shows the 'Items' tab of a quote interface. A red circle with the number '6' highlights an information icon (i) next to a quote line. A red box highlights a pop-up window titled 'Information on this Line' which contains the text: 'Service Level System has auto adjusted subscription for the licence based on current availability'. The quote line itself is highlighted in yellow and contains the following details:

Customer	Start/ End Date	Unit List Price	Quantity	Ext List
VIOLENCE PREVENTION CENTER INC 413106136	19-MAR-2019 18-MAR-2020	1285	2	2

Below the table, the 'Smart Account' is listed as '--'. At the bottom, there are pagination controls showing '25' items per page, 'Page 1 of 1', and buttons for 'Remove From Quote', 'Edit Lines', and 'Assign Smart Account'.



3.4.1 Add Line Items or New Subscriptions to the Quote

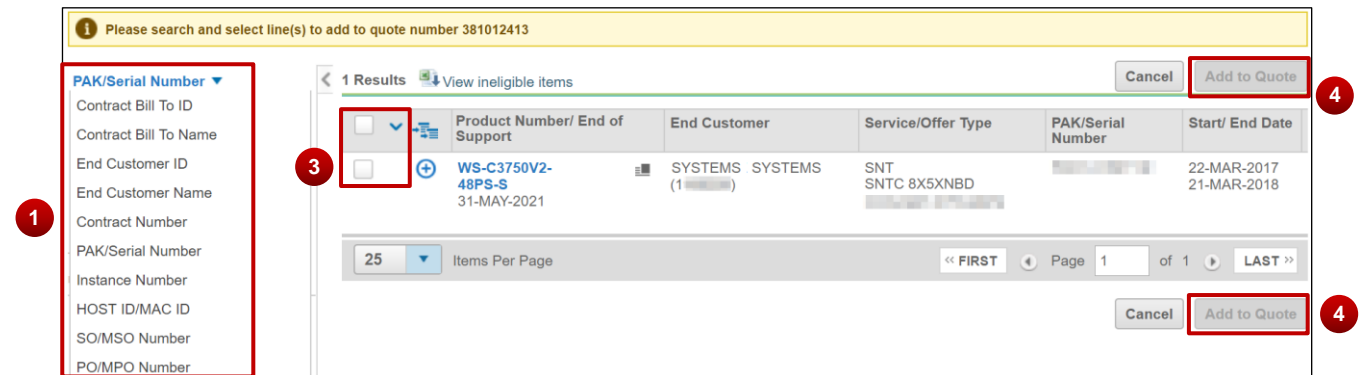
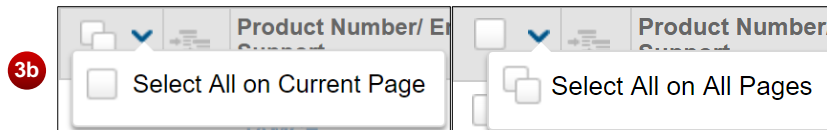
Note: For instructions on how to add new subscriptions to your quote, [click here to view the “Add New Subscriptions” Quick Reference Guide](#). Read on to learn how to add additional renewal or new service lines to your quote.

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.

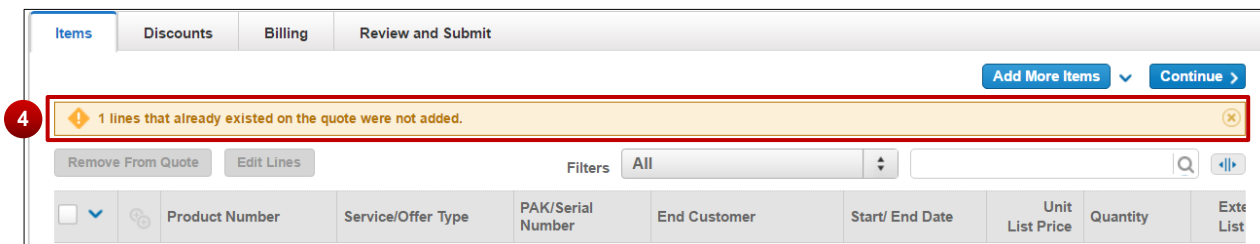
After you create a quote from the landing page, you can add additional lines. Click **Add More Items**, and you will go to a search page where you can choose line items to add to the quote.

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/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 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.







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.

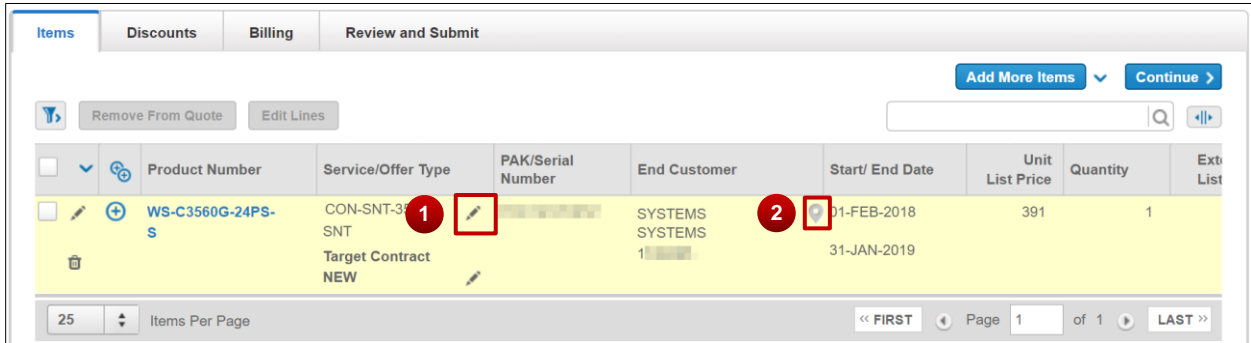





3.4.3 Edit Lines on the Quote

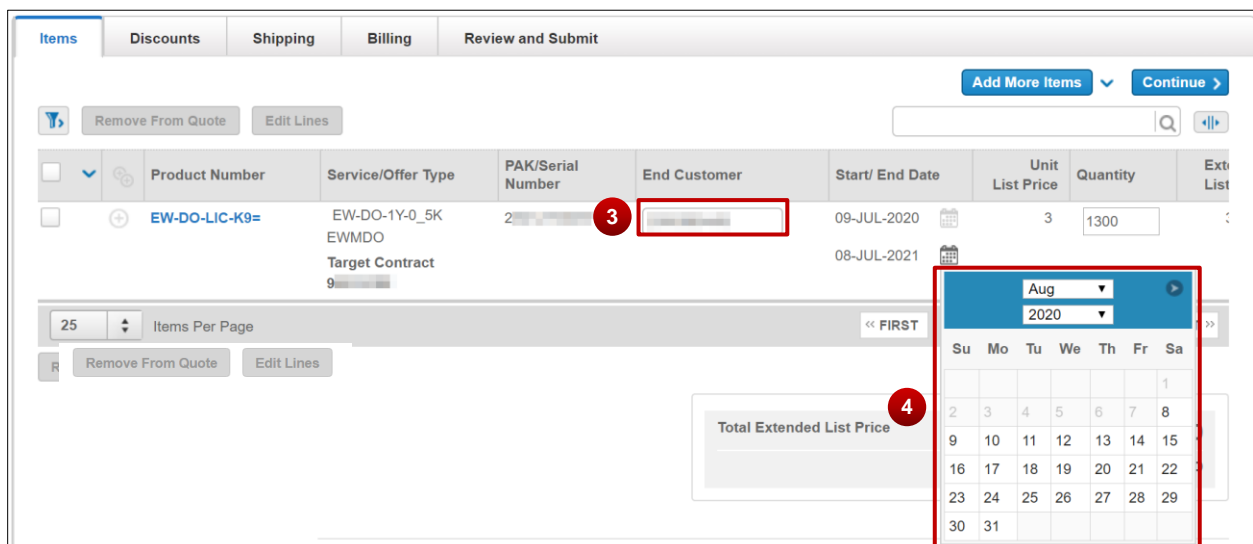
You can edit a line item in a few ways, including editing multiple lines at a time (multi-line edit).


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



	Product Number	Service/Offer Type	PAK/Serial Number	End Customer	Start/ End Date	Unit List Price	Quantity	Ext List
	WS-C3560G-24PS-S	CON-SNT-3 SNT		SYSTEMS SYSTEMS	01-FEB-2018 31-JAN-2019	391	1	

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.



	Product Number	Service/Offer Type	PAK/Serial Number	End Customer	Start/ End Date	Unit List Price	Quantity	Ext List
	EW-DO-LIC-K9=	EW-DO-1Y-0_5K EWMDO	2		09-JUL-2020 08-JUL-2021	3	1300	



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.



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

Change Services/Subscriptions

SERVICE/SUBSCRIPTION SELECTION

ESA-SO-LIC=

The required subscription is not available for the selected service.

A technical error occurred. Please try again later and if the problem persists please contact Cisco Customer Support. (C0225)

Based on the subscription items marked with a red 'X' are not available in the selected price list u34 or Install Site Country. (C0509)

Service Preference

Service

Hardware, Software, Services and Subscriptions

ESA-SO-LIC=

ESA Sophos Anti-Malware

ESA-SO-1Y-S7

ESA Sophos Anti-Virus 1YR Lic Key, 4K-4999 Users

12.00

Edit Subscriptions

Remove All Services

Edit Subscriptions

SELECT SUBSCRIPTIONS FOR

ESA-SO-LIC=

A pricing error for this item has occurred. Please try again later and if the problem persists please contact Cisco Customer Support. (C0225)

Items marked with list price as '-' are not available in the selected price list u34 or Install Site Country. (C0509)

License Quantity

4200

Update

Clicking Update refreshes the Available Subscription SKUs based on the License Quantity entered.

View Quantity - Based Pricing

Available Subscription SKUs

Hardware, Software, Services and Subscriptions	Start/End Date	Duration	Unit List Price
ESA SOPHOS LIC			
<input checked="" type="radio"/> ESA-SO-1Y-S7 Email Sophos Anti-Virus 1YR Lic Key, 4K-4999 Users	5 Start Date 10/01/2015 End Date 09/30/2016	1 12 Month(s)	-
<input type="radio"/> ESA-SO-3Y-S7 Email Sophos Anti-Virus 3YR Lic Key, 4K-4999 Users		6 36 Month(s)	-
<input type="radio"/> ESA-SO-5Y-S7 Email Sophos Anti-Virus 5YR Lic Key, 4K-4999 Users		60 Month(s)	-

Cancel Done

7.

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.
 - a. A start date must be today's date or a future date.
 - b. An end date must be set to the contract end date or further into the future. 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.



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

	Product Number	Service/Offer Type	PAK/Serial Number	End Customer	Start/ End Date	Unit List Price	Quantity	Ext. List
<input type="checkbox"/>	EW-DO-LIC-K9=	EW-DO-1Y-0_5K EWMDO		UNIFIED SCHOOL	09-JUL-2020 08-JUL-2021	3	1,300	

25 Items Per Page

Remove From Quote Edit Lines

Change Contract

☒ Enter an Existing Contract Number
 ☐ Co-Term
 ☒ Create a New Contract

☐ Select Existing Contract from this Quote

Tip: You can enter a temporary name to group lines that need to go into the same new contract

Cancel Apply

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

3.4.7 Co-Terming Services

- 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](#).

	Product Number	Service/Offer Type	PAK/Serial Number	End Customer	Start/ End Date	Unit List Price	Quantity	Ext. List
<input type="checkbox"/>	EW-DO-LIC-K9=	EW-DO-1Y-0_5K EWMDO		UNIFIED SCHOOL	09-JUL-2020 08-JUL-2021	3	1,300	

25 Items Per Page

Remove From Quote Edit Lines

Change Contract

☒ Enter an Existing Contract Number
 ☒ Co-Term
 ☐ Create a New Contract

☐ Select Existing Contract from this Quote

Tip: You can enter a temporary name to group lines that need to go into the same new contract

Cancel Apply



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.

The screenshot displays the 'Items' tab in the Cisco Commerce User Guide interface. A table lists line items with columns for Product Number, Service/Offer Type, PAK/Serial Number, End Customer, Start/End Date, Unit List Price, and Quantity. The first line item is highlighted in yellow. A search bar is located above the table, and a dropdown menu is open below it, showing search results for 'CISCO HIGH LIFT OF TEXAS'. A red box highlights the search bar and the dropdown menu. A red circle with the number '1' is placed over the search bar, a red circle with the number '2' is placed over the dropdown menu, and a red circle with the number '3' is placed over the 'Create New Site' button at the bottom of the dropdown menu.

Product Number	Service/Offer Type	PAK/Serial Number	End Customer	Start/End Date	Unit List Price	Quantity
EW-DO-LIC-K9=	EW-DO-1Y-0_5K EWMDO Target Contract 9	2	Cisco	09-JUL-2020	3	1300

25 Items Per Page

Remove From Quote Edit Lines

Remove From Quote Edit Lines

Remove From Quote Edit Lines

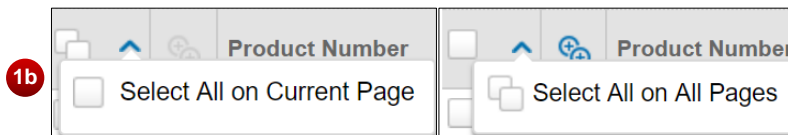
3900 in USD

Add More Items Continue



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.

1	<input type="checkbox"/>	Product Number	Service/Offer Type	PAK/Serial Number	End Customer	Start/ End Date	Unit List Price	Quantity	Ext List
	<input checked="" type="checkbox"/>	CP-6945-C-K9-WS	CON-SNT-CP69... SNT Target Contract 9		PETROLEUM COMPANY INC 4	26-OCT-2017 25-OCT-2018	16.5	1	
	<input type="checkbox"/>	CP-6945-C-K9-WS	CON-SNT-CP69... SNT Target Contract 9		PETROLEUM COMPANY INC 4	26-OCT-2017 25-OCT-2018	16.5	1	
1	<input checked="" type="checkbox"/>	CP-6945-C-K9-WS	CON-SNT-CP69... SNT Target Contract 9		PETROLEUM COMPANY INC 4	26-OCT-2017 25-OCT-2018	16.5	1	

25 Items Per Page

« FIRST Page 1 of 1 LAST »



- 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.

2

Remove From Quote **Edit Lines** Filters All

	Edit	Product Number	Service/Offer Type	PAK/Serial Number	End Customer	Start/ End Date	Unit List Price	Quantity	Ext List
<input type="checkbox"/>		WS-C3560G-48PS-E	CON-SNT-3560... SNT Target Contract 9		HEALTHCORP 3	01-JUN-2017 31-JAN-2018	662	1	44
<input type="checkbox"/>		WS-C3560G-48PS-E	CON-SNT-3560... SNT Target Contract 9		HEALTHCORP 3	01-JUN-2017 31-JAN-2018	662	1	44
<input type="checkbox"/>		WS-C3560G-48PS-E	CON-SNT-3560... SNT Target Contract 9		HEALTHCORP 3	01-JUN-2017 31-JAN-2018	662	1	44
1	<input checked="" type="checkbox"/>	ASA5520-BUN-K9	CON-SNT-AS2... SNT Target Contract 9		HEALTHCORP 3	01-JUN-2017 31-MAY-2018	1103	1	
<input type="checkbox"/>		WS-C3560G-48PS-E	CON-SNT-3560... SNT Target Contract 9		HEALTHCORP 3	01-JUN-2017 31-JAN-2018	662	1	44

5 Items Per Page 1 << FIRST Page 2 of 84 LAST >>

Remove From Quote **Edit Lines** 2

Total Extended List Price **945409.03**
All Prices shown in USD



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.

Technical Services

Software

Hardware

Software

UCS W PL PSS 24X7X2 (PSW4)

UCS W PSS 8X5X4 OS (PSW6)

UCS W PSS 24X7X4 OS (PSW7)

UCS W PL PSS 8X5X4 (PSW2)

UCS W PL PSS 24X7X4 (PSW3)

SMB Support Assistant (SMB)

3YR SMARTNET 8X5XNBD (3SNT)

3YR SMARTNET 24X7X4 (3SNT)

3YR SMARTNET 24X7X4 OS

Edit Line Items

Coverage Info

Technical Services

Hardware

Type or Select Service Level

Add Another Service Level

Start Date

End Date

Product Info

End Customer

Quantity

Tip: Applicable for Subscription

Contract Info

Enter an Existing Contract Number

Tip: Choose a value from the autosuggested list

Select Existing Contract from this Quote

Select

Create Contract

NEW

Tip: You can enter a temporary name to group lines that need to go into the same new contract

Cancel

Apply

Add Line(s)

Continue



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.

☒ Contract Info

☐ Enter an Existing Contract Number

☐ Select Existing Contract from this Quote

☒ Create Contract

NEW

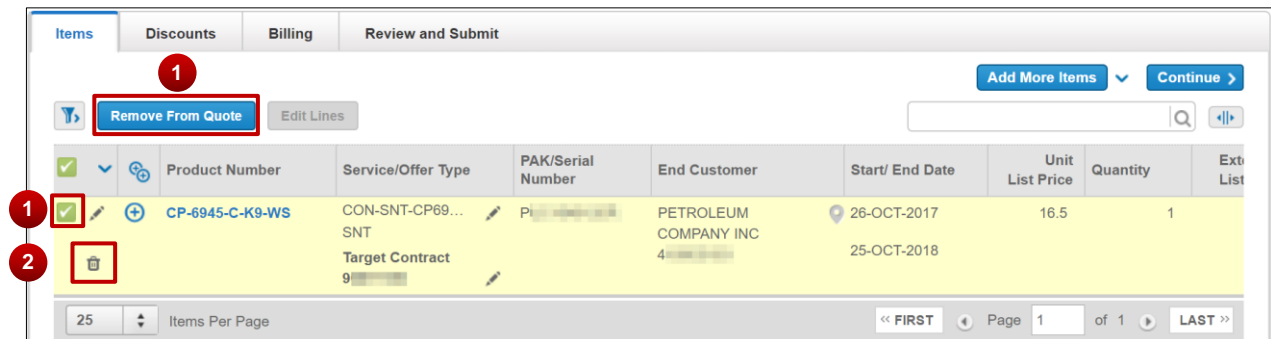
Tip: You can enter a temporary name to group lines that need to go into the same new contract.

<input type="checkbox"/>	Product Number	Service/ Offer Type	PAK/Serial Number
<input type="checkbox"/>	+ MCS7825I4-K9-CMD1	CON-OSP-MCS... SMARTnet Onsi... Target Contract NEW	
<input type="checkbox"/>	+ WS-C2960X-24PS-L	CON-OSP-WSC... SMARTnet Onsi... Target Contract NEW	

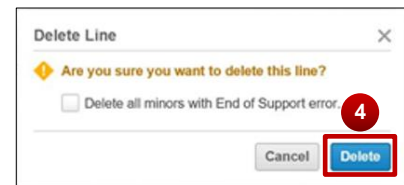


3.4.10 Remove Line Items

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](#).



3.5 Quoting: Discounts Tab

1. Resellers can see their final price without contacting the distributor.
2. The Discount Percentage and Amount will appear, and you no longer need to contact the distributor for the Extended Net Price.
3. The intended use is not editable.

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.

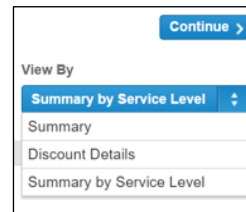
PRO TIP

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, 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.



Items Discounts Billing Review and Submit

Continue >

✓ Your Quote has been priced successfully.

⚠ Warning: Changing information on this page may impact Pricing.

Intended Use ⓘ Deal ID

Resale

Don't have a Deal ID?

	Hardware, Software and Services	Service Level	PAK/Serial Number	Unit List Price	Date		Quantity	Prorated List Price			
					Begin	End					
+	CTS-P55DC60-K9	ECDO	PTN17360177	11038	27-Jan-2018	26-Jan-2019	1	11038	15	1655.7	9382.3
+	WS-C3850-48U-S	SNT	FOC1916U1DY	882	01-Jun-2020	31-May-2021	1	882	23	202.86	679.14

25 Items Per Page

<< FIRST Page 1 of 1 LAST >>

View By

- Summary
- Summary
- Discount Details
- Summary by Service Level



3.6 Quoting: Shipping Tab (Subscription Lines Only)

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

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.



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.

Items

Discounts

Shipping

Billing

Review and Submit

Continue >

Shipping Address and Contact

Enter or Search Ship To

Apply to All Lines

Delivery Method

5 eDelivery Email Address Apply to All Lines

Product Number/ PAK Number	Qty	Delivery Method/ PAK Preference	eDelivery Email Address	End Customer	Ship To Copy all from End Customer
6 SMA-WMGT-LIC= SMA-WMGT-1Y-S11	65000	ELECTRONIC SINGLE	<input type="text"/>	GOVERNMENT (<input type="text"/> -2)	<input type="text"/> Copy from End Customer
SMA-WMGT-LIC= SMA-WMGT-1Y-S11	65000	ELECTRONIC SINGLE	<input type="text"/>	GOVERNMENT (<input type="text"/> -2)	<input type="text"/> Copy from End Customer

Continue >



3.6.2 Search for Shipping Address and Add Contact

Items Discounts **Shipping** Billing Review and Submit

Continue >

Shipping Address and Contact

123

Customer Number	5
Ship To ID	6
Address	456 CANTAY BRIDGE RD UMMING ON L5R4A1 CA

1 Add Contact

Apply to All Lines

1. Click **Add Contact** to add a contact to the shipping address. See section [3.2.1, Add Contact](#), for how to add contact information.
2. Click **Apply to All Lines**, and contact and shipping information to the subscription line items.

Shipping Address and Contact

MARKET STORE 456

Customer Number	4
Ship To ID	2
Address	3004 BRIDGE RD - STORE #456 UMMING GA 32835 US

Contact

Name	John Doe
Phone	1234567890
Email	jdoe@website.com

2 Apply to All Lines

PRO TIP

The Ship-To assigned here on the shipping tab is the line-level Ship-To for each line. You have to assign the distributor quote-level Ship-To and contact in the billing tab.



3.7 Quoting: Billing Tab

3.7.1 Pre-Selected BID and Ship-To ID

Some Distributors will have selected a BID and Ship-To ID for you. In these cases you will see the following display.

1. Change the Distributor if you need to. If the Distributor does not have a pre-selected BID and Ship-To-ID you may see an error as in section 3.7.2

Items Discounts Shipping **Billing** Review and Submit

Billing Information

Distributor: **TECH**

Billing Address *

TECH DATA PRODUCT MANAGEMENT INC

Customer Number: [Redacted]
Bill To ID: [Redacted]
Operating Unit: CISCO US OPERATING UNIT
Address: 5350 DATA DRIVE
CLEARWATER FL 33760
US

Reseller Address and Contact *

ALEXANDER OPEN SYSTEMS

Customer Number: 1
Bill To ID: 7
Operating Unit: CISCO US OPERATING UNIT
Address: 116 INVERNESS DRIVE
EAST SUITE 375
C/O CASTLE PINES
CAPITAL
ENGLEWOOD CO
80112
US

Contact

US Federal Government
☐ Yes ☒ No

Continue >

PRO TIP

If the distributor set up the Bill-To and Ship-To IDs wrong, by leaving out information, you will see an error. Contact the distributor to address this.



3.7.2 No Pre-Selected Quote Support

When a Distributor has not pre-selected a default contact, you will see the following, with errors noting what is missing.

1. **Errors will be displayed above the Billing and/or Ship-To information. You should contact the distributor to make sure they set default contacts, Bill-To, and Ship-To IDs.**
2. If you wish you can also select a new distributor to find one that has a default contact.
3. If you find a Distributor with default contact information, you will see that information here. Edit if needed. See section [3.2, Initiate Quote and Verify Billing Information](#), for how to change these fields.
4. **Note:** Your selected distributor must open the quote in order to add their Bill-To ID to the Quote. This is necessary for the quote to become valid.

PRO TIP Changing the taxability option from “Resale” will result in errors on your quote.

The screenshot shows the 'Billing' tab of a form with the following elements:

- Navigation tabs:** Items, Discounts, **Billing**, Review and Submit.
- Errors (highlighted with a red box and labeled 1):**
 - Bill to ID is not specified on the quote.
 - Distributor Ship To ID information is Missing
- Distributor selection (labeled 2):** A dropdown menu showing 'DISTRIBUTING CO'.
- Reseller Address and Contact (labeled 3):**
 - OPEN SYSTEMS:** A table with fields for Customer Number (1), Bill To ID (7), Operating Unit (CISCO US OPERATING UNIT), and Address.
 - Add Contact:** A button with a plus icon.
- US Federal Government:** Radio buttons for Yes and No.
- Buttons:** 'Continue >' buttons at the top right and bottom right.



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.



3.9 Quoting: Review and Submit

1. An informational message will alert you that the quote is ready to order. You must contact the distributor to order the quote.
2. If your quote contains errors, the icon corresponding to the tab with the error will appear red.

Note: If you see the error **QOT_BID_NOT_FOUND_H**, make sure your distributor logs in and opens the quote. See the [Billing section](#) for more details.

3. Click Sample Invoice to view and download your invoice for all your valid quotes. You can view and download a sample invoice in either XLSX or CSV format if you 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.
4. Enter your Reseller PO and/or a Partner Reference.
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** when you are finished. Your chosen distributor can now view your quote.

3.9.1 Order Confirmation Messages

We send two email messages confirming your order.

We send the **Order Acknowledgement** message to the distributor user who submitted your 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 Completion** message to the distributor user who submitted your order, whoever created the quote, and to the email listed as the reseller contact on your quote. Your order completion message will have a link to an Order Completion Report. Anyone with access to that quote can download the report from the link 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