Cisco Commerce

Deals and Quotes

User Guide

Table of Contents

Click a topic or sub-topic name below to move directly to that section.

1 Conventions Used in this Document

- Keyboard sequences you press are shown in bold. Example: “Press **Tab** to move to the next field.”
- Links that display in blue on the Cisco Commerce homepage, whether underlined or not, are underlined in the user guide. Example: “On the Items tab, click Find Products.”
- Menu or sub-menu paths are separated by a “>”. Example: “**Select Intended Use** > **Managed Service**.”
- Tabs you click have no special formatting. Example: “Click the Items tab.”
- Buttons you click on the screen are shown in bold. Example: “Click **Continue**.”
- The labels on radio buttons, drop-down menus, checkboxes, and fields that correspond have no special formatting. Examples: “Click the Yes radio button.” “Click the Service Program drop-down menu.”
- When there are multiple ways of accomplishing a specific task, preferred methods are highlighted as follows:

The blue circle around a lower case “i” means *reader take note*. Notes contain helpful suggestions or reference to material not covered in the manual.

For example:

Best Practice: Search for an address before creating a new one. Add a shipping address only if the address is not found.

- Active hyperlinks to other documents or within the same document are shown in blue (RGB: 0, 0, 255) and underlined. Example: “Additional information is available in the Getting Started with Cisco Commerce User Guide.” or “See Creating a Deal for more details.”
- In sections describing a process that starts from somewhere other than the Cisco Commerce homepage, a process flow indicates how to get there. For example, you add products to a quote in the Quote tab, which means you would have already created the quote through the Deals & Quotes header tab. The following illustration would therefore display at the beginning of the Add Products to a Quote section.

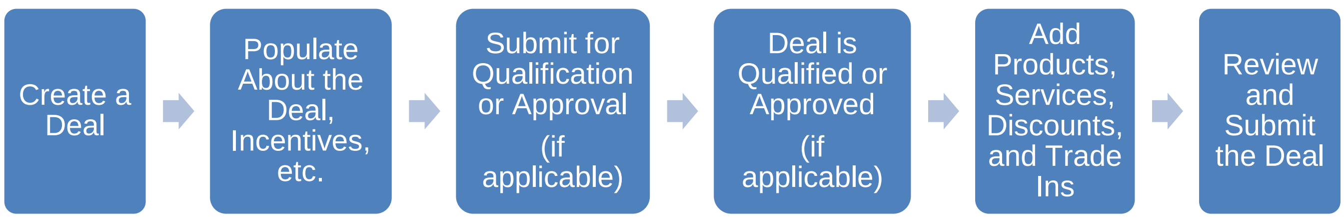
2 Cisco Commerce Deals and Quotes Workflow

To understand how the deals and quotes functionality fits within Cisco Commerce and the Cisco sales structure, see the Getting Started with Cisco Commerce User Guide.

In Cisco terms, deal is the overall agreement between you and Cisco that enables you to purchase goods or services at a discounted price. The quote is the “output” (the compilation of configured products and services with applicable discounts and incentives, which include programs and promotions) that you can convert to an order for purchase.

Best Practice: Register deals to take advantage of Cisco’s pricing model with stackable, incremental discounts that allow multiple incentives (programs and promotions) on a single deal, and reduce your dependency on non-standard transactions.

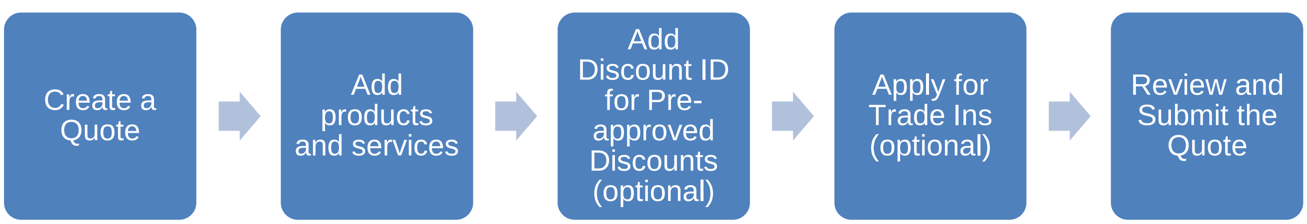
- Create a deal when you need to apply incentives that require additional approval.



Deals Workflow

Note: You can get the best price for Cisco solutions by stacking multiple eligible incentives.

- Create a quote for standard discounts or pre-approved promotions (requiring no additional approval). In this case, quote will be automatically approved.



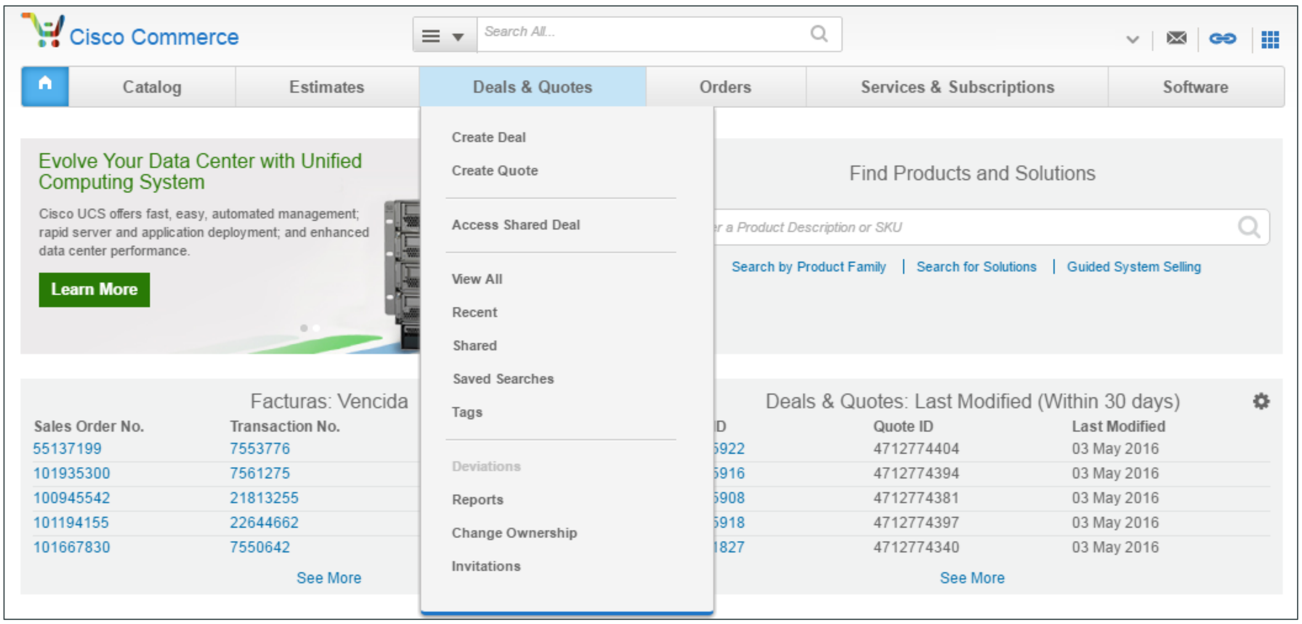
Quotes Workflow

Note: Despite this distinction, you can create deals with or without incentives and, incentives may or may not require qualification.

2.1 Using Options on the Deals & Quotes Tab

In Cisco Commerce, the Deals & Quotes tab allows you to:

- Create and manage deals and quotes
- Access shared deal
- View all or specific deals and quotes
- Tag deals and quotes
- Manage reports



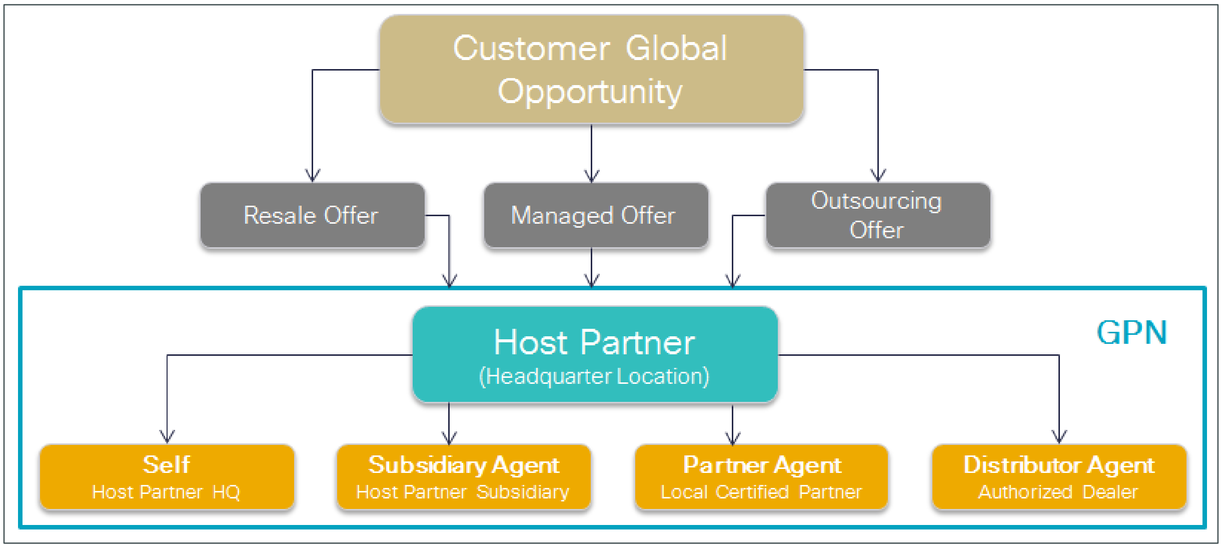
Options on the Deals & Quotes Tab

2.2 Global Partner Network

The Global Partner Network (GPN) enables you to fulfill key customers' global opportunities by leveraging the capabilities of other Cisco partners and distributors to serve locations that you do not normally serve.

Host partners (you) can determine how best to use GPN to serve opportunities for resale, managed, or outsourcing offers in multiple countries.

Host partners select an agent partner (self, subsidiary agent, partner agent, or distributor agent) for each landing country. Through GPN, host partners are able to drive the end-to-end deal process using the global deal framework that enables the creation of related local deals.



Global Partner Network Overview

The global deal framework is used to manage the related local deal components. The global deal ID is not an orderable ID. The local deal provides the orderable ID for a particular landing country customer site. Refer to the Global Partner Network page for more details.

See Creating a Global Deal to create a global deal.

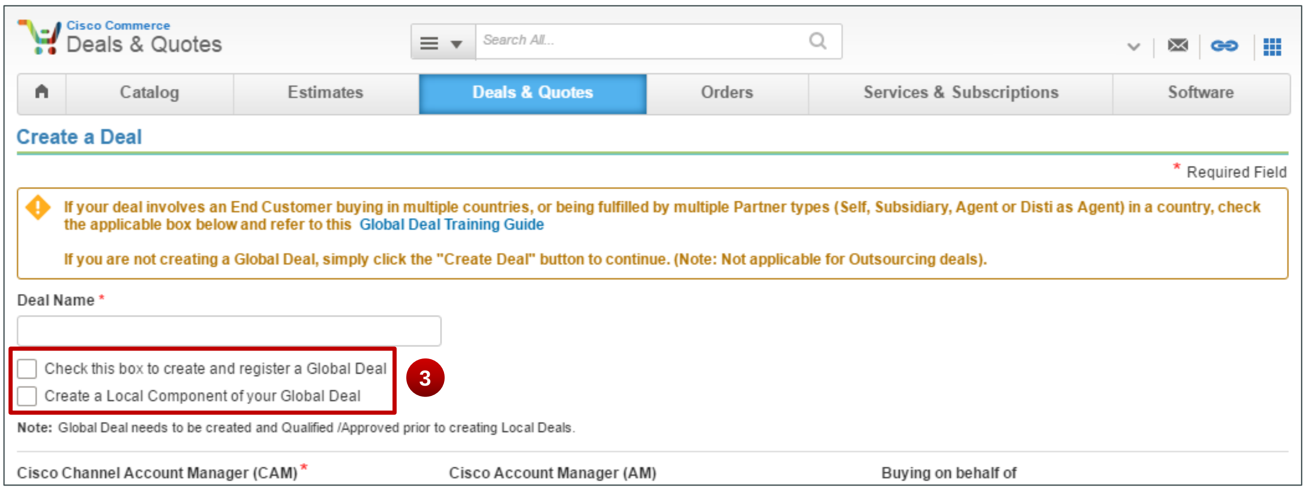
3 Creating a Deal

You can create deals with or without incentives (programs and promotions). Incentives may or may not require qualification. Deals can have trade-ins and if eligible, you can opt for Try and Buy.

To use an incentive, follow the steps for creating a deal. Create a quote when only pre-approved programs and promotions will be applied (see Creating a Quote).

To create a deal, complete the following steps:

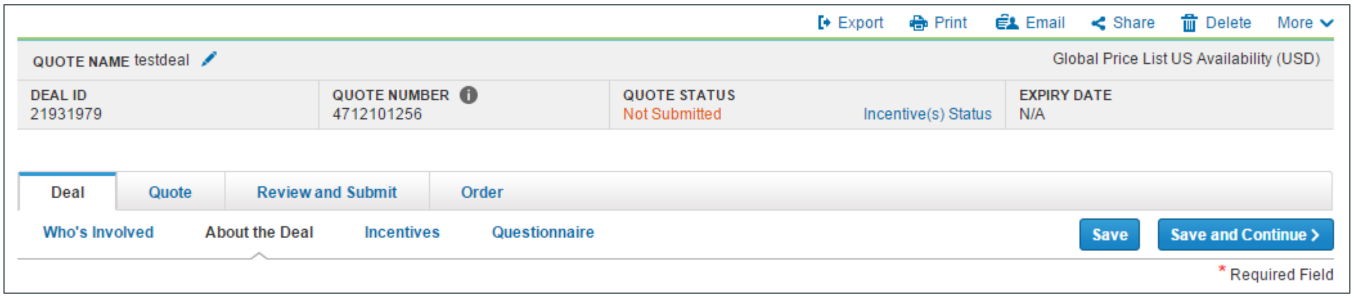
1. From the Deals & Quotes tab on Cisco Commerce homepage, click **Create Deal**. The Create a Deal page displays.



Create a Deal Page

2. Click the Deal Name field and enter a deal name. Once created, this name displays on the Deals and Quotes page.
3. If the deal involves an end customer buying in multiple countries or is being fulfilled by multiple partner types, check the appropriate checkbox. Global deals must be created and qualified/approved prior to creating local deals. See Creating a Global Deal.
4. Populate Partner, End Customer, and Cisco Channel Account Manager (CAM) information. See Populating Who's Involved.
5. Click **Create Deal**.

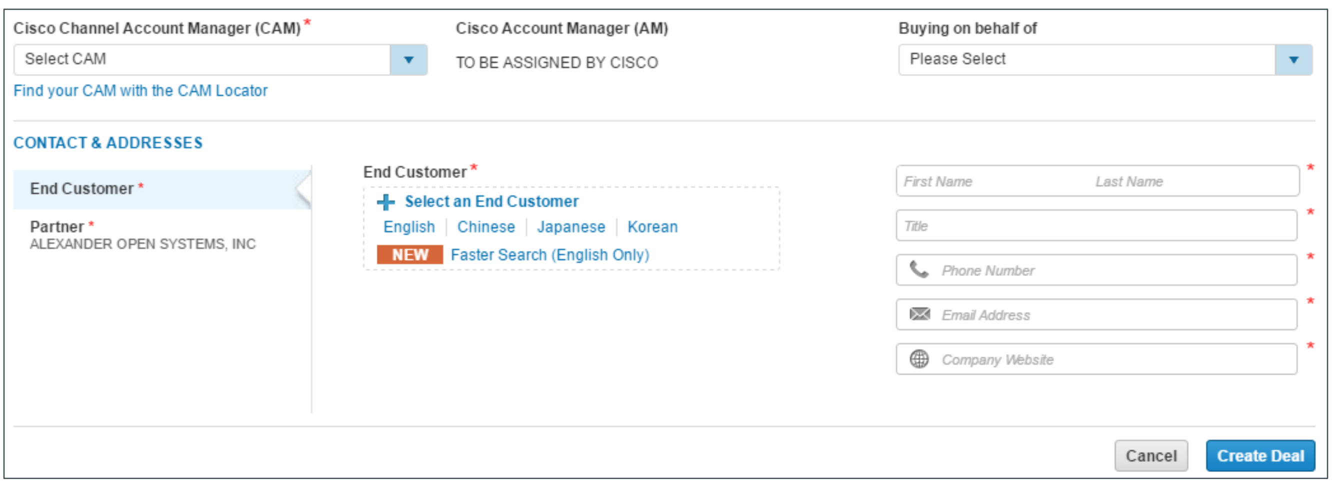
   If the deal being created is not global, click **Create Deal** without checking either checkbox.
6. The Deals and Quotes page displays. The quote name displays at the top of the page. The deal ID and quote number also display. The Who's Involved tab is already populated from the details you filled when creating the deal.
7. Continue to Selecting the Deal Options.



Deals and Quotes Page

3.1 Populating Who's Involved

On the Create a Deal page, populate partner, end customer, and Cisco CAM information. The information populated here will display on the Deals and Quotes page: Who's Involved tab.



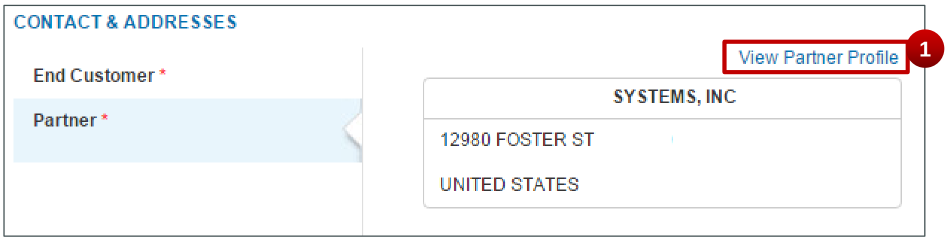
Create a Deal Page

Note: Be aware that there are different parameters for setting end customer address and install site depending on region.

For example, in Canada, the end customer and install site addresses cannot be a P.O. box. In the US, the end customer address should be the company headquarters address, which could be a P.O. box; however, the install site should be the actual address.

3.1.1 Populating the Partner Section

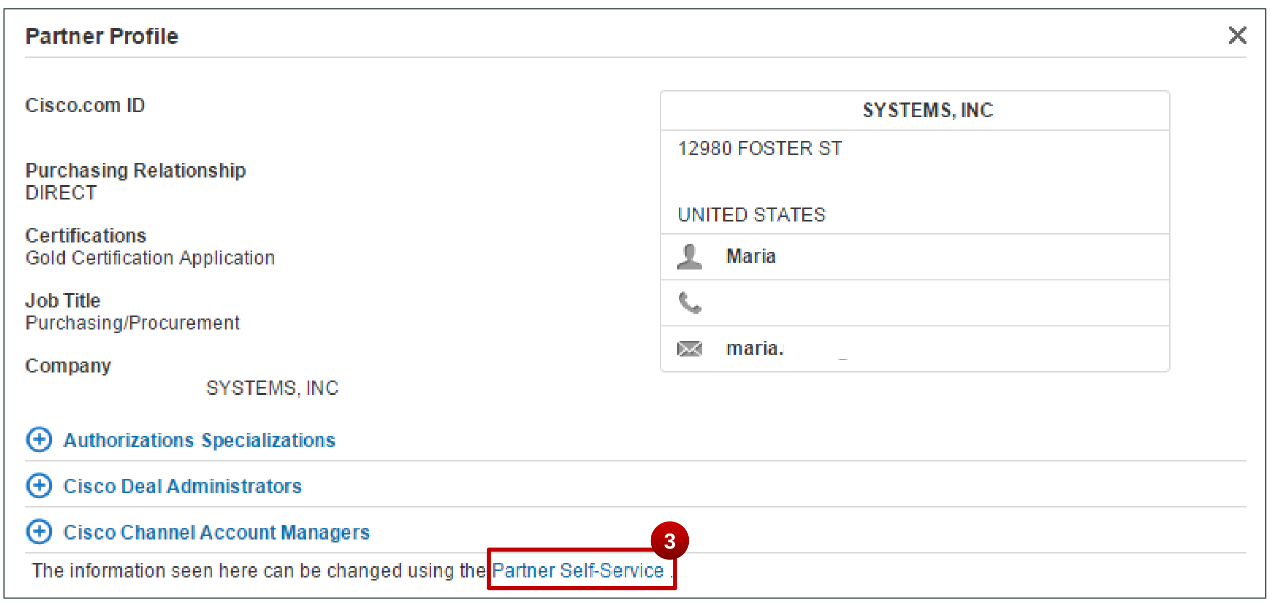
3.1.1.1 Viewing and Changing the Partner Profile



Partner Section

The partner name and address are populated by the system.

1. To view or edit the partner information, click View Partner Profile. The Partner Profile dialog box displays.



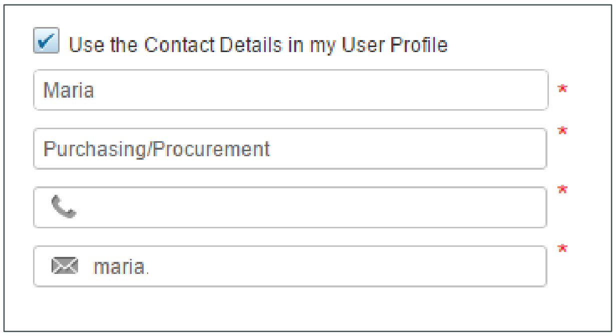
Partner Profile Dialog Box

2. In addition to the information shown in this figure, the Partner Profile dialog box also displays the Contact names and e-mail addresses for the Cisco Deal Administrator and the Cisco Channel Account Managers.
3. To edit profile information, click Partner Self-Service at the bottom of the dialog box. The Partner Self-Service Tool displays in a new browser window.
4. Alternatively, click Close X to close the dialog box and return to the Create a Deal page.

3.1.1.2 Viewing and Adding the Partner Contact

To automatically populate the Partner Contact section, check the “Use the Contact Details in my User Profile” checkbox.

Alternatively, click each field and enter the appropriate information.



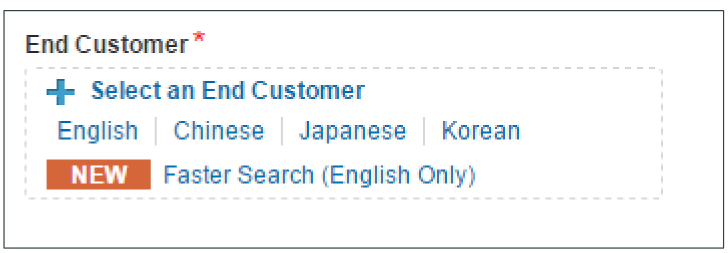
Partner Contact Section

3.1.2 Populating the End Customer Section

3.1.2.1 Adding an End Customer

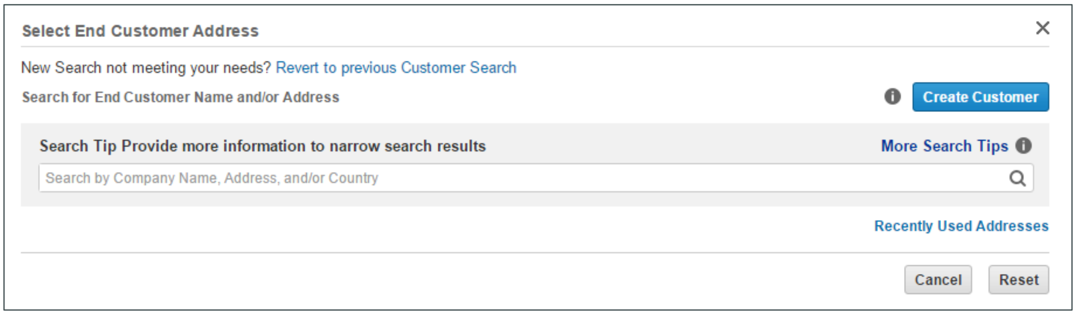
You can add an end customer in the following ways:

- Select from the Cisco Directory in preferred language, that is, English, Chinese, Japanese, or Korean
    - View and select from the recent end customers
- Create an end customer address



End Customer Section

- Alternatively, select **Faster Search (English Only)** to search, create or select recently used address.



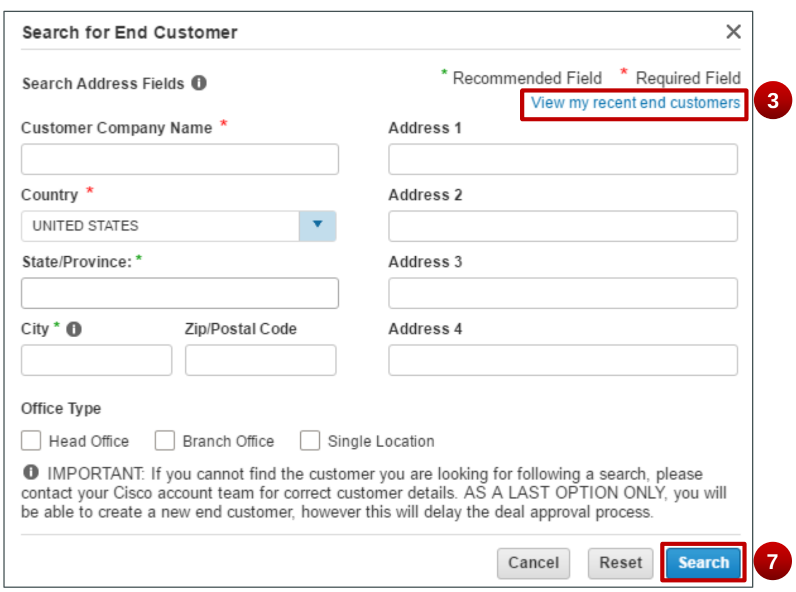
Faster Search Dialog Box

To add an end customer, complete the following steps:

1. From the End Customer section on Create a Deal page, click English, Chinese, Japanese, or Korean to search the Cisco directory in the respective language.
2. If you select Chinese, the system will translate addresses entered in Chinese to English and you will have to confirm or modify the translation. The Search for End Customer dialog box displays with search fields. There are two options for finding an end customer.
   - View my recent end customers link
   - Search by customer company name, country, city (optional), and state or province

Note: The billing country automatically populates in the Country drop-down menu.

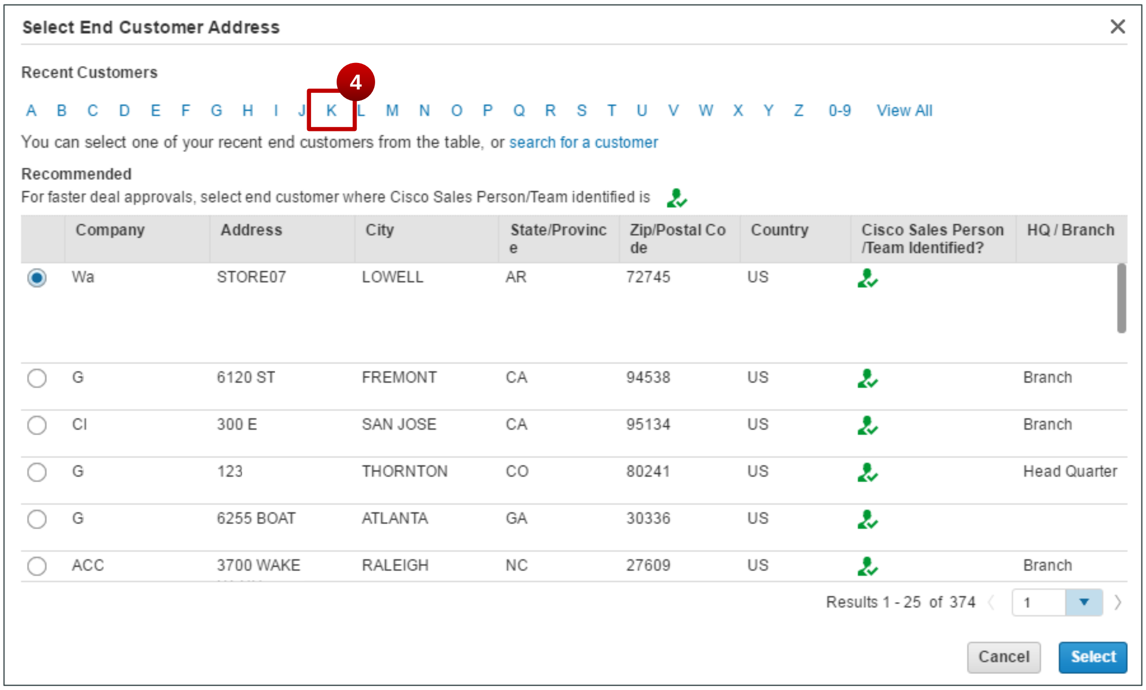
If the desired address does not display as a result of a search, the option to create a new address displays on the Search for End Customer dialog box. See Creating a Customer Address.



Search End Customer Dialog Box

3. To populate the fields using end customer information recently used in Cisco Commerce Deals & Quotes tab, click View my recent end customers. Use this link if the end customer has been used before on a deal or a quote. The Select End Customer Address dialog box displays.

   The end customers will be sorted based on whether a Cisco Sales Person or Team has been identified.



Select End Customer Address Dialog Box

4. Click the appropriate radio button. The list can be narrowed by clicking the letter link that corresponds to the first letter of the company name.

Best Practice: Selecting an end customer entry with a green icon in the Cisco Sales Person/Team Identified? column will route the deal directly to the identified Account Manager (AM), improving deal cycle time.

5. Click **Select**.

   The address populates in the End Customer section.

6. Alternately, fill the appropriate parameters in the Search for End Customer dialog box, such as customer company name, country, city (optional), and state or province.
7. Click **Search**. The Select End Customer Address dialog box displays.
8. Click the radio button next to the appropriate customer.
9. Click **Select**. The address populates in the End Customer section.

Note: The City field is optional. Click the City field and begin typing the name of the city; this field will present options in a drop-down menu after at least three characters are entered. Click the correct option.

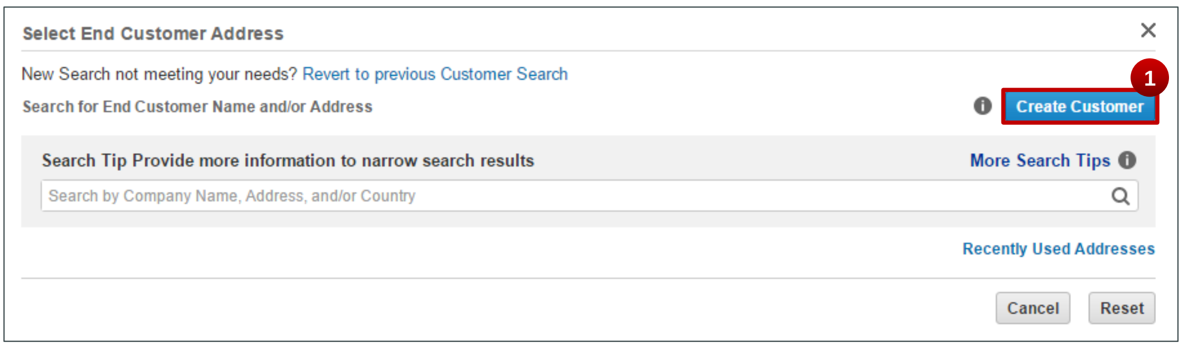
3.1.2.1.1 Creating a Customer Address

If the search for a customer address does not return the desired results, you can create a new customer address.

Note: Create a customer address only after verifying that the customer address does not already exist in the database. Use this only as a last option as this will delay the deal approval process.

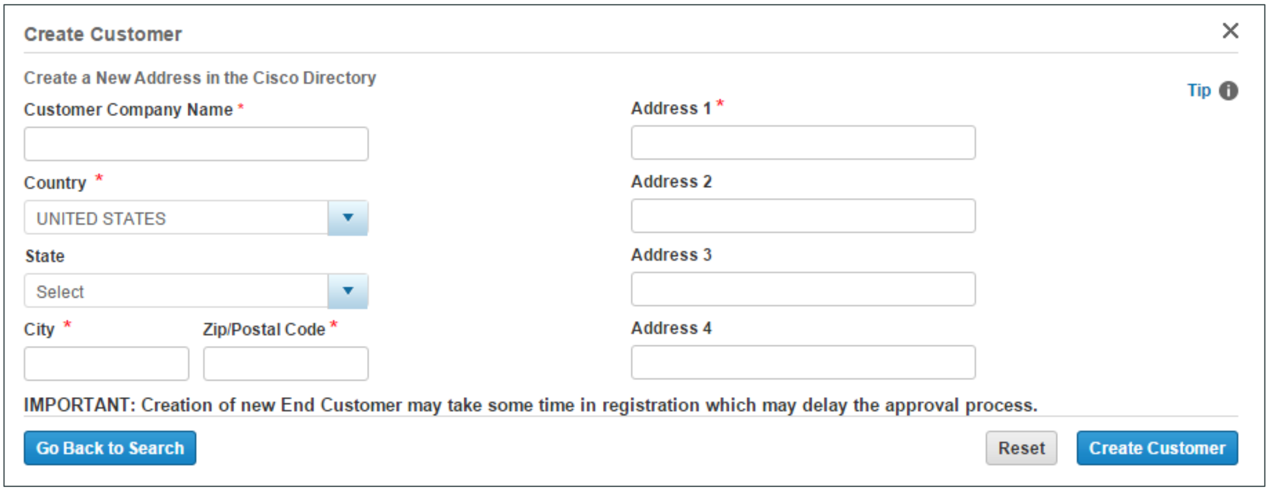
To create a new customer address, complete the following steps:

1. Click **Faster Search (English only)**, and from the Select End Customer Address dialog box that displays, click **Create Customer**. The Create Customer dialog box displays.



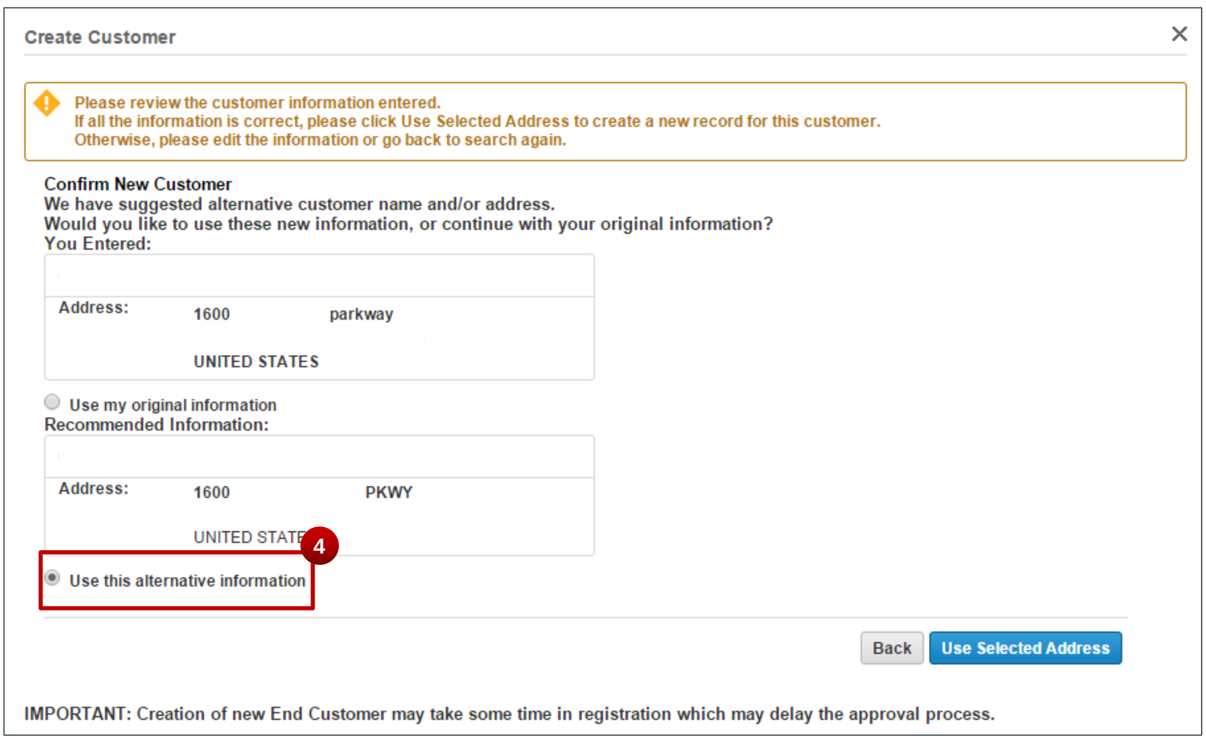
Search for End Customer: Create Customer

2. Populate the appropriate information in the fields. Some of the fields are automatically populated from the original search. Click the appropriate fields and make changes if applicable.
3. Click **Create Address**. The Select End Customer Address dialog box displays. Cisco Commerce may generate a recommended address based on the information provided by you.



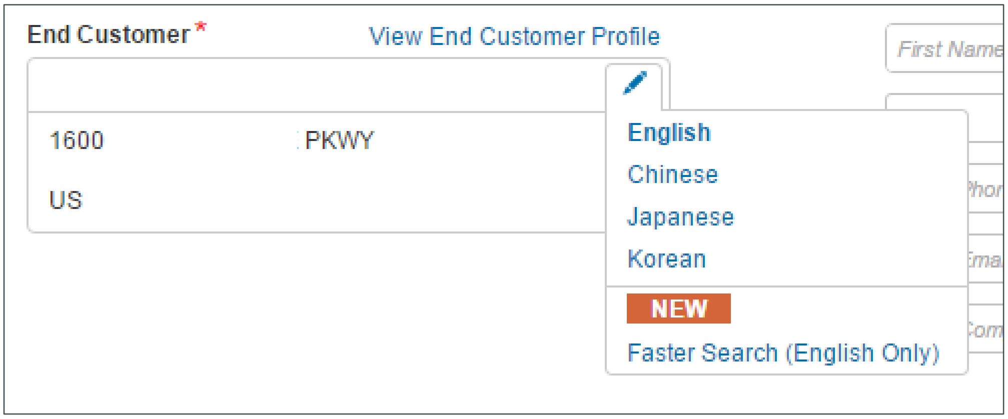
Create a New Address in the Cisco Directory Dialog Box

4. Click the radio button to use the original information or the information provided by the system.
5. Click **Use Selected Address**.



Select End Customer Address

3.1.2.2 Selecting a Different End Customer

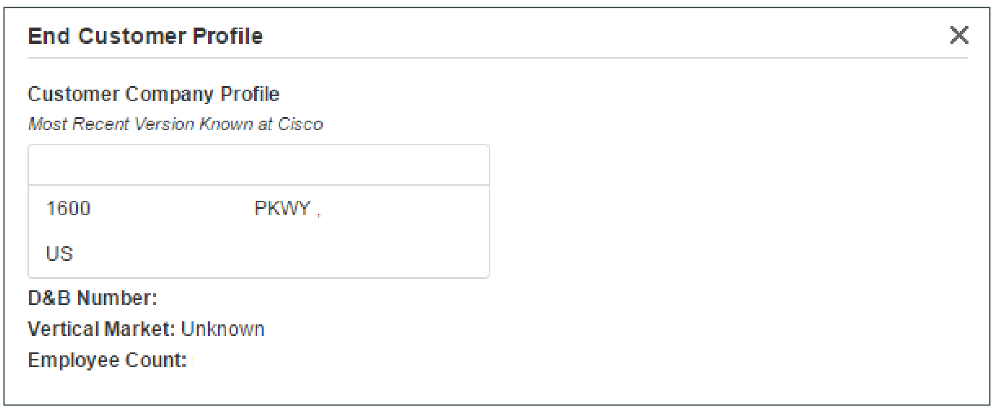


End Customer Section

If the end customer address needs to be changed once it is populated, click the edit icon in the end customer section and use the steps from Adding an End Customer.

3.1.2.3 Viewing the End Customer Profile

To view the end customer profile, click View End Customer Profile. The Company Profile dialog box displays. Click Close X to close the dialog box and return to the Create a Deal page.



Company Profile Dialog Box

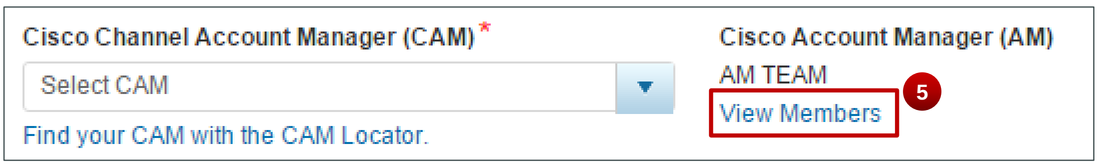
3.1.2.4 Adding an End Customer Contact

Under the Customer Contact, click each field and enter the appropriate information for the customer. All the required information is indicated by the red asterisk (*). This is not a search function; populate all the fields completely and accurately.

Customer Contact

3.1.3 Populating the Cisco Section: CAM

If the deal needs to be approved, an e-mail will be sent to the CAM.



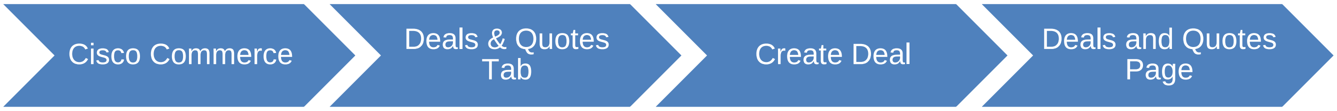
Cisco Section

There are several ways to add the CAM.

1. If the CAM is known and displays in the drop-down menu, click the Cisco Channel Account Manager (CAM) drop-down arrow and select the appropriate option.
2. Alternatively, click Find your CAM with the CAM Locator. A new window opens displaying the CAM locator. Complete the information to identify the appropriate CAM.
3. If the CAM is known, but not listed in the drop-down menu, select Other from the drop-down menu.
4. The Cisco Channel Account Manager (CAM) Email ID field displays. Enter the Cisco user name for the CAM.
5. Once an end customer is selected, the AM or Team name displays on this page. Click View Members to review the names.

Once all fields are populated on Create a Deal page, click **Create Deal**. The About the Deal tab displays.

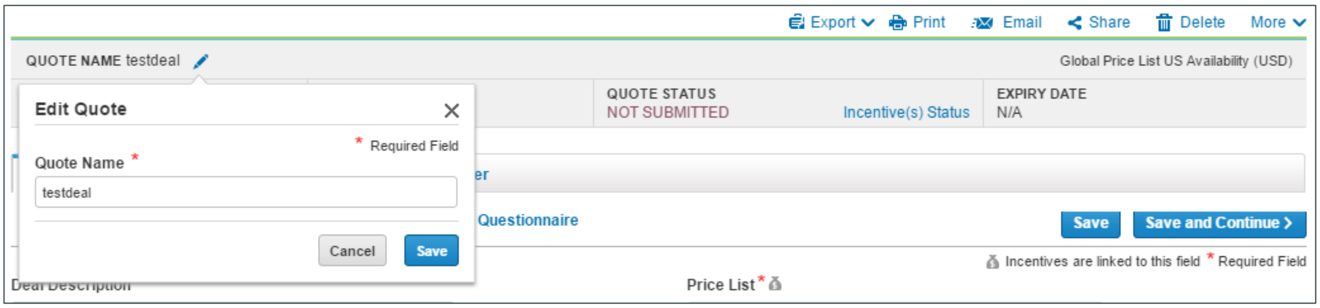
3.2 Selecting the Deal Options



3.2.1 Changing the Deal Name

To change the quote name, complete the following steps:

1. Click the edit icon ( ). The Edit Quote dialog box displays.

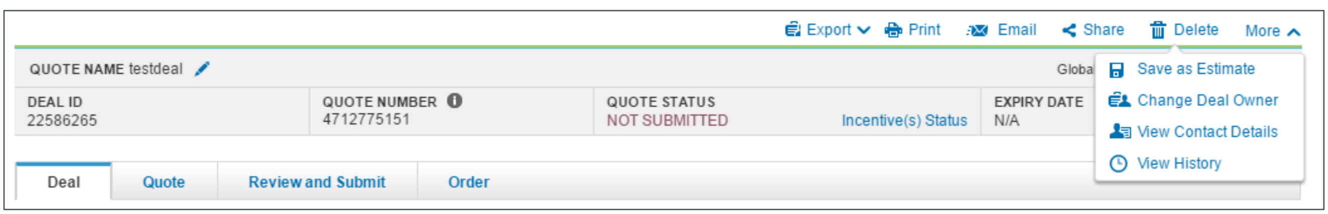


Change Deal Name Dialog Box

2. Click the Quote Name field and enter the new quote name.
3. Click **Save**. The dialog box closes.

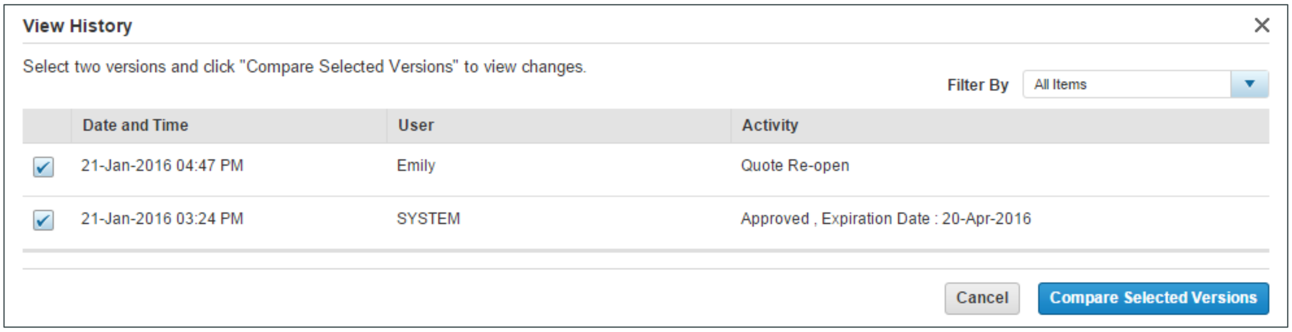
3.2.2 Viewing the Quote History

To view the quote history, click View History.



Deals and Quotes Page

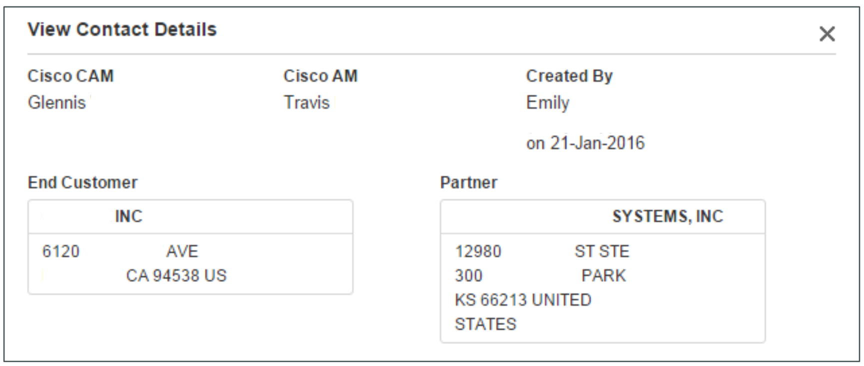
The Quote History dialog box displays the date and time, the user, and the activity for the quote. From the Quote History dialog box, you can opt to compare versions of the quote. Click More to expand the drop-down menu and then click View History. To compare two versions, click the checkbox for two of the versions and click **Compare Selected Versions**. The changes display.



Quote History Dialog Box

3.2.3 Viewing Contact Details

To view the contact details, click More to expand the drop-down menu and then click View Contact Details. The View Contact Details dialog box displays the end customer, partner, Cisco Channel Account Manager (CAM), Cisco Account Manager (AM), and created by information as applicable.



Deals and Quotes Page: View Contact Details

Note: The CAM can also be referred to as the Partner Account Manager (PAM) or Partner Business Manager (PBM). If the quote needs to be approved, an e-mail will be sent to the CAM.

3.3 Populating Information About the Deal

Populate the information on the About the Deal sub-tab.

Follow the descriptions below to populate the fields on this sub-tab:

Note: A red asterisk indicates mandatory fields (*). Remaining fields are optional, but are a good practice to complete.

1. Deal Description: Click the Deal Description field and enter additional information.

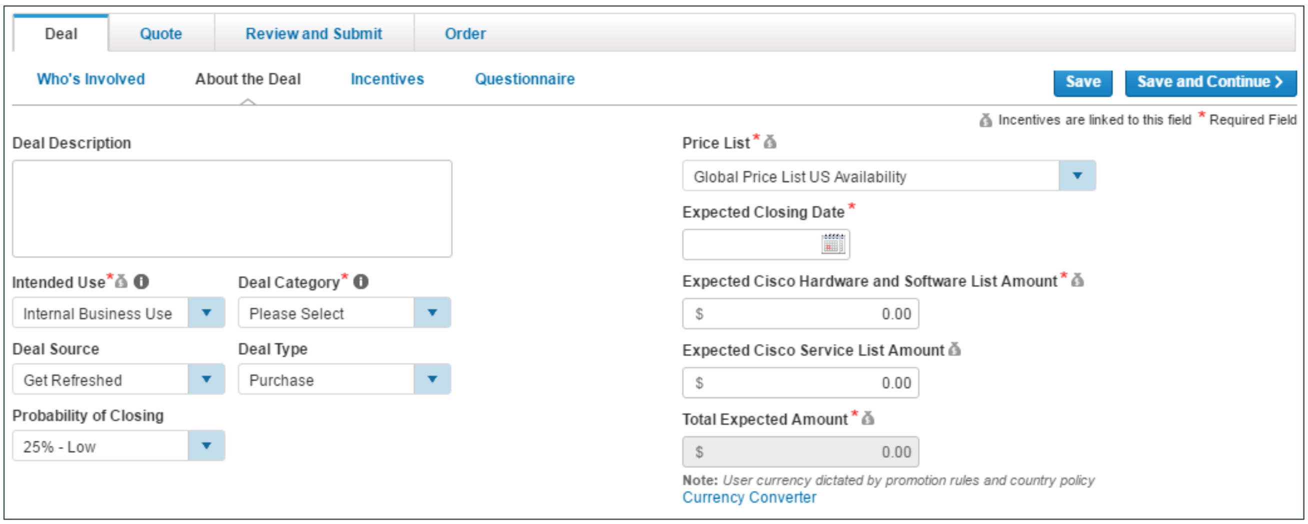
2. Intended Use*: Click the Intended Use drop-down arrow and click the appropriate option.

   Incentives are offered for certain Intended Use deals, so list the appropriate use.

   Hover over the more information icon to see definitions for Intended Use. Information on how the associated SKUs will be used for different options is shown.

3. Deal Category*: Click the Deal Category drop-down arrow and click the appropriate option.

   Hover over the more information icon to see explanations for each of the options, which indicate how the order will be deployed. See [Managing the Managed Service Provider Option]() if you select Managed Service.



Deal Tab: About the Deal Sub-Tab

4. Deal Source: Click the Deal Source drop-down arrow and click the appropriate option.
5. Deal Type: Click the Deal Type drop-down arrow and click Purchase or Lease.

Note: If you are a 1-tier partner placing product lease orders, select Lease and enter or select the Cisco Capital bill-to address and contact on the Quote tab. Product and service lease order capabilities are available (see [Using Financing Options (For US and Canada only)]()).

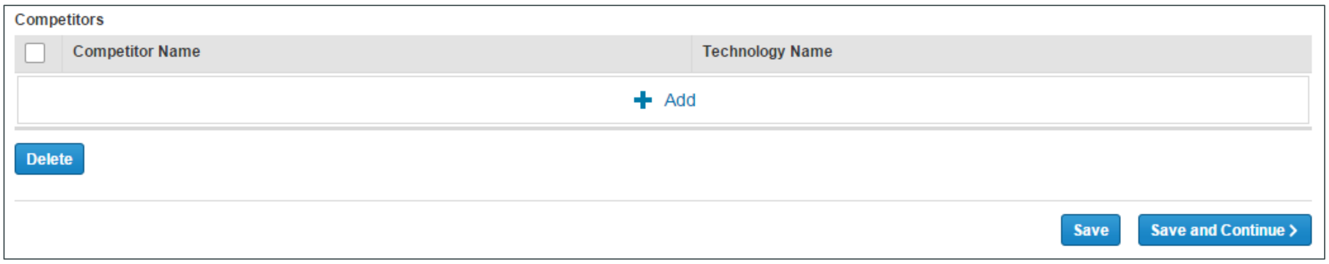
6. Probability of Closing: Click the Probability of Closing drop-down arrow and click the appropriate option.

   Cisco AMs, along with you, formulate forecasting numbers for both revenue and shipments. The expected closing date and probability of closing percent data contribute to forecast reporting. The following three fields, for hardware and software list amounts, are also reported.

7. Price List*: Select the appropriate price list. Some of the incentives can be region and price list specific.
8. Expected Closing Date*: Click the Expected Closing Date calendar icon and click the appropriate date from the calendar.

9. Expected Cisco Hardware and Software List Amount*: Click the Expected Cisco Hardware and Software List Amount field and enter the estimated value.
10. Expected Cisco Service List Amount: Click the Expected Cisco Service List Amount field and enter the estimated value.
11. Total Expected Amount: The Total Expected Amount field populates automatically when the above values are entered. The currency is dictated by promotion rules and country policy.

    For information on the Currency Converter, see [Currency Converter](#).



About the Deal Sub-Tab: Competitors

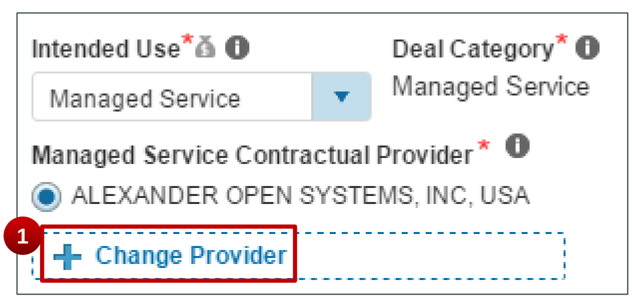
12. Competitors: To manage competitor information, complete the following steps:
    - Click **+ Add**.
    - Click the Competitor Name drop-down arrow and select the appropriate option.
    - Click the Technology Name drop-down arrow and select the appropriate option.
    - To add additional competitors, repeat steps above.
    - To remove an added competitor, check the appropriate competitor checkbox and click **Delete**.

3.3.1 Managing the Managed Service Provider Option

You can select Managed Service from Intended Use or Deal Category drop-down menus. When Managed Service is selected, the option to add a Managed Service Contractual Provider displays.

The Managed Service Contractual Provider is the entity that provides the proactive monitoring of the customer's deployment. If this is also the party placing the order, select self, if not, then provide the name of the provider that provides the management of the service.

To learn more about the Managed Service Contractual Provider, click What's this?.



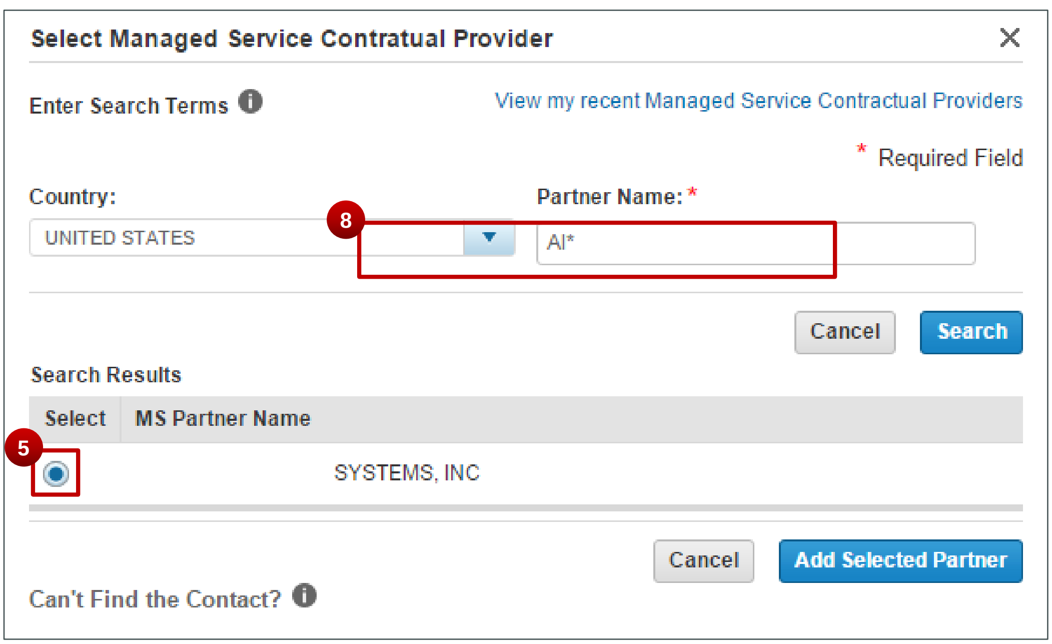
Managed Service Option

To select a provider, complete the following steps:

1. Click Select Provider if adding a Managed Service Contractual Provider or click the Change Provider radio button, if already defaulted by the system. The Select Managed Service Contractual Provider dialog box displays.
2. Click the Country drop-down arrow and select the appropriate country. This is not a mandatory field, but if the selected partner operates in multiple regions, it is recommended that you indicate the country.
3. Click the Partner Name field and enter the provider name. This is a search field so complete information is not required.

   To search using a wild card, enter a few letters of the partner name followed by an asterisk (for example, AB*). All partners with a name that begin with AB will display in the Search Results section.
4. Click **Search**. The search results display under the Search Results section.

Note: The selection in the quote automatically defaults into an order when a quote is converted to an order. However, you can change the provider as appropriate on the order.



Select Managed Service Contractual Provider

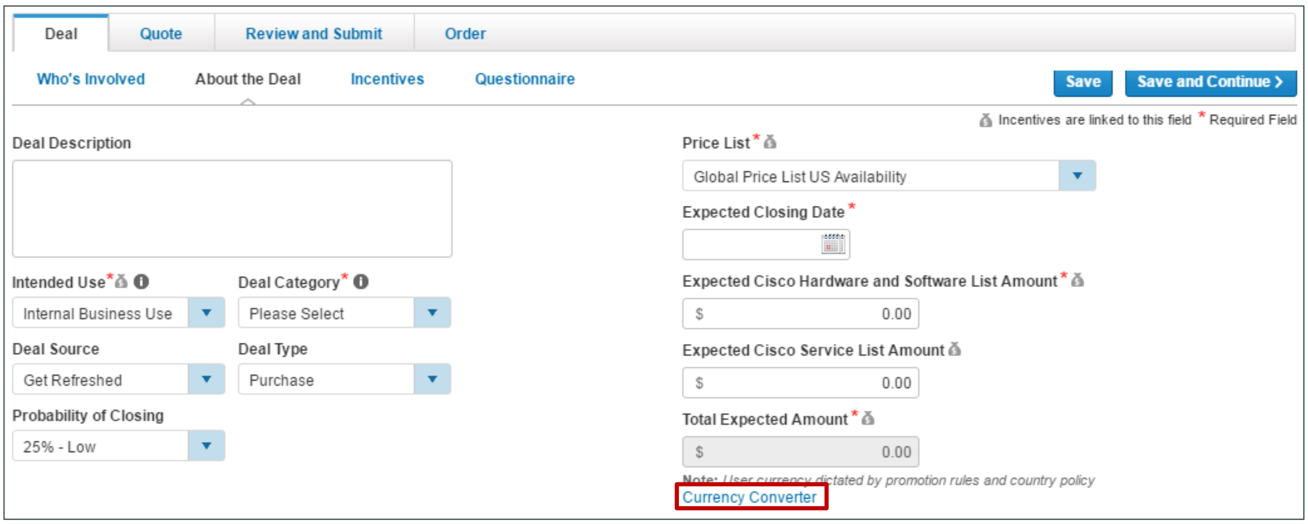
5. Click the appropriate radio button.
6. Click **Add Selected Partner**.

   The deal details are updated to reflect the Managed Service Contractual Provider. The About the Deal page refreshes.

7. To change the indicated provider, select the appropriate radio button. If you need to add another provider, repeat steps 1-6 of this process.
8. Alternatively, from the Select Managed Service Contractual Provider dialog box, click View my recent Managed Service Contractual Providers to select a recent provider.
9. Click **Save** to save the information and remain on the About the Deal sub-tab.
10. Click **Save and Continue** to advance to the Incentives sub-tab.

3.3.2 Currency Converter

On the About the Deal sub-tab, use the Currency Converter link if needed. Currency conversions are for reference only and do not populate anywhere else in the deal.



Deal Tab: About the Deal Sub-Tab

Once all sections of the About the Deal tab have been completed, click **Save and Continue**. The Incentives sub-tab displays.

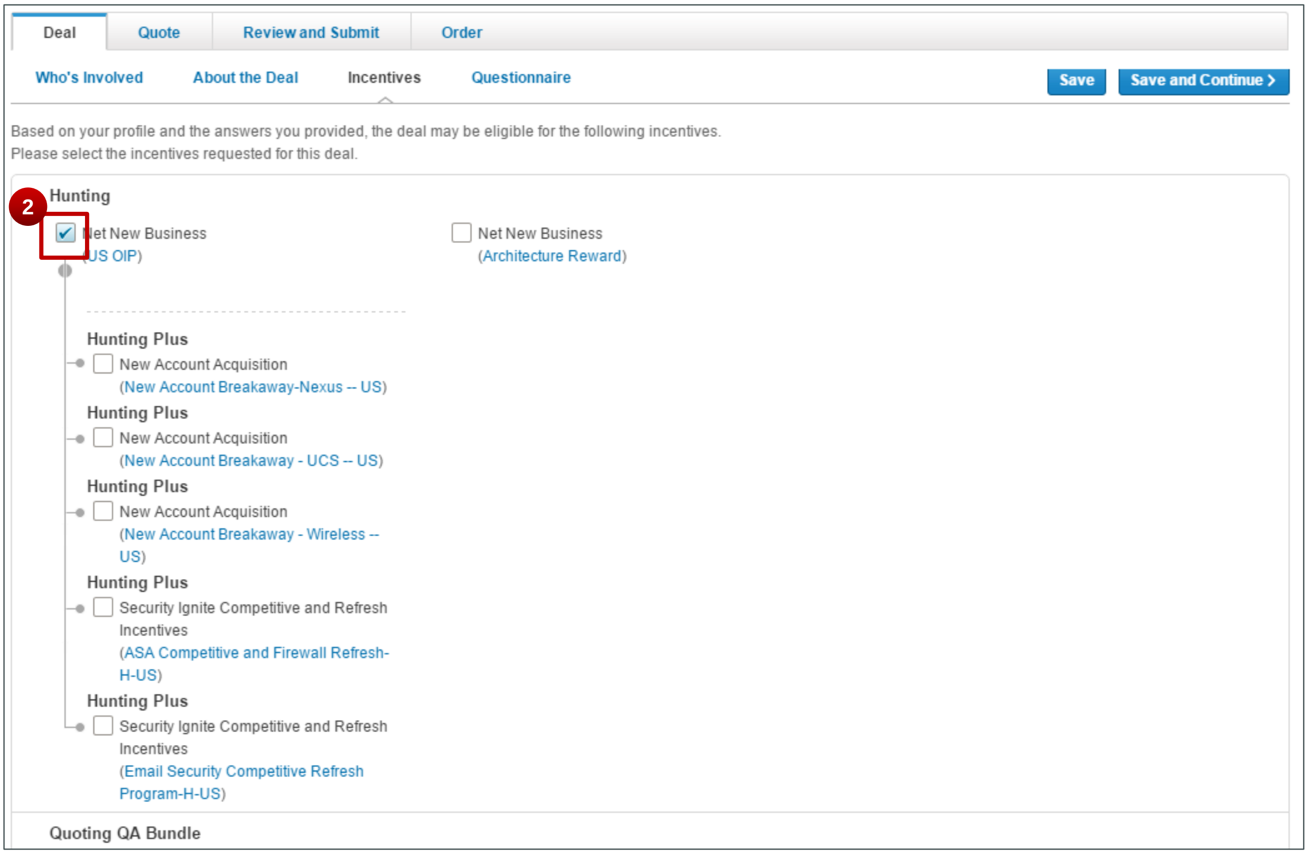
3.4 Viewing and Selecting Applicable Incentives

By registering your deals with Cisco Commerce, you can take the advantage of Cisco's stackable discounts and incentives. Not all incentives (programs or promotions) are available to all users, and some may require qualification. You can register a deal without adding the items to the quote, for example, to qualify a deal before the incentive expires.

Note: You can get the best price for Cisco solutions by stacking multiple eligible incentives.

To view and select applicable incentive(s), complete the following steps:

1. From the Deal tab: Incentives sub-tab, scroll down to view the available incentives.
2. Select appropriate incentive(s) under the given categories. Incentives that you are not eligible for will display but are not selectable. Hover over the information icon to learn why you are not eligible for that specific incentive. Additional incentive details can be found by clicking the hyperlink next to a given incentive.



Deal Tab: Incentives Sub-Tab

The incentives available to you are based on your region, price list, and deal characteristics. The incentives you select can be interdependent and guide your eligibility criteria.

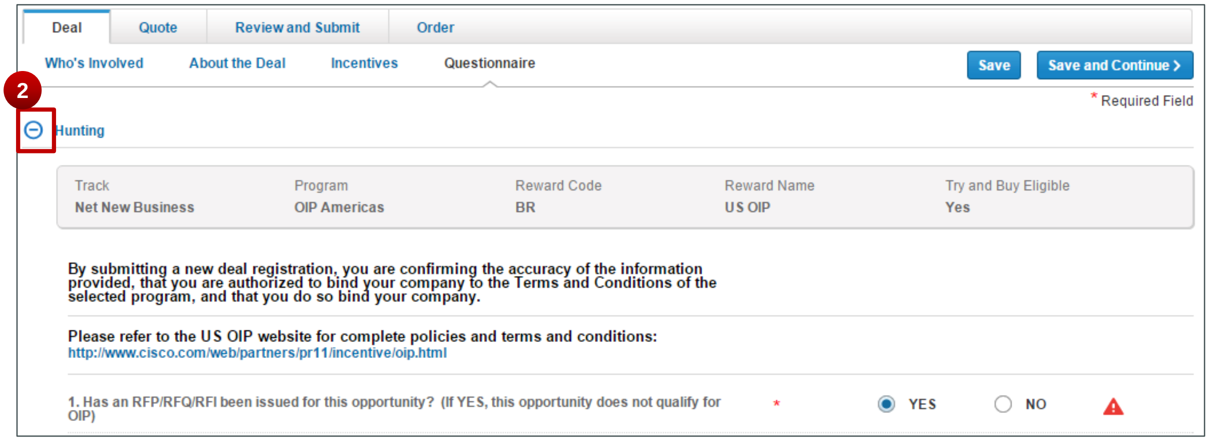
Best Practice: With Cisco's pricing model, base discounts provide market-relevant prices. When you register deals with Cisco Commerce, you can select multiple incentives to grow business and also participate in Cisco-initiated opportunities.

3. Click **Save and Continue**. The Questionnaire sub-tab displays.

3.5 Filling In the Questionnaire

Based on the incentive(s) selected, the Questionnaire sub-tab displays information to be filled in for initial validation.

Note: A red exclamation point will display if your answer to a question does not meet the criteria for a given incentive.

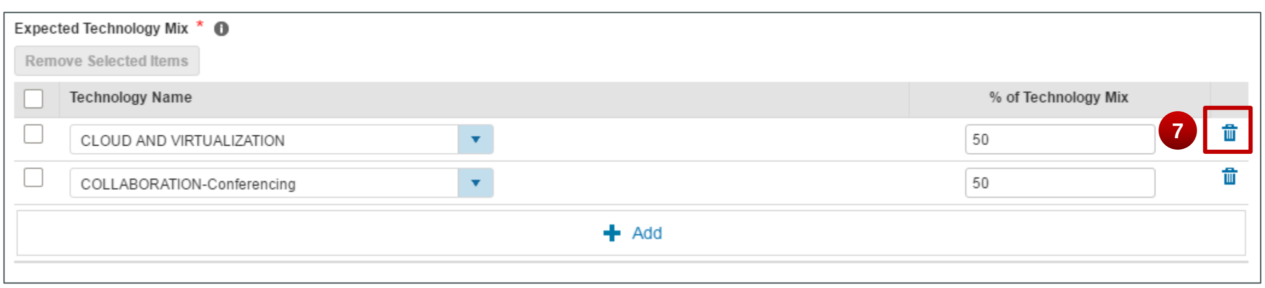


Deal Tab: Questionnaire Sub-Tab – A Sample

Complete the following steps to fill in the questionnaire:

1. Answer the questions listed for each incentive. Select Yes or No, or fill the text fields as required.
2. If you have selected multiple incentives, click to expand the questions for each incentive type.
3. To provide the Expected Technology Mix, click **+ Add**.
4. Click the Technology Name drop-down arrow and click the appropriate option.
5. Click the % of Technology Mix field and enter an appropriate value.
6. To add other technologies, repeat steps above.
7. To remove an added technology, check the appropriate checkbox and click the delete icon.

   Regardless of the number of technologies, the total percentage must equal 100%.

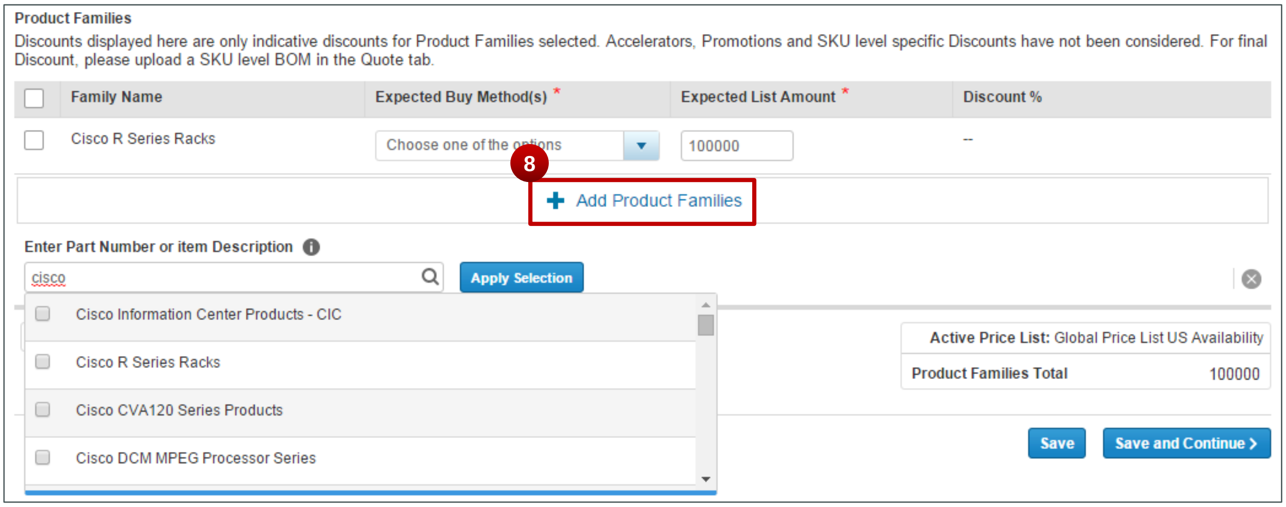


Deal Tab: Questionnaire Sub-Tab – Expected Technology Mix

If an incentive requires product family, the Product Families section will display on the questionnaire sub-tab.

Note: Deals can be qualified at the Product Family level, however a SKU level BOM will still be required for deal approval.

Once the deal is qualified, you will be able to see the actual discount percentage.



Questionnaire Sub-Tab: Product Families

8. To add a product family, click **+ Add Product Family**.
9. Enter a Part Number or item description and select the appropriate option(s) from the results.
10. Click **Apply Selections**. The Product Families selected get populated on the page.
11. Select the Buy Method. Once the deal is qualified, Buy Method cannot be changed.

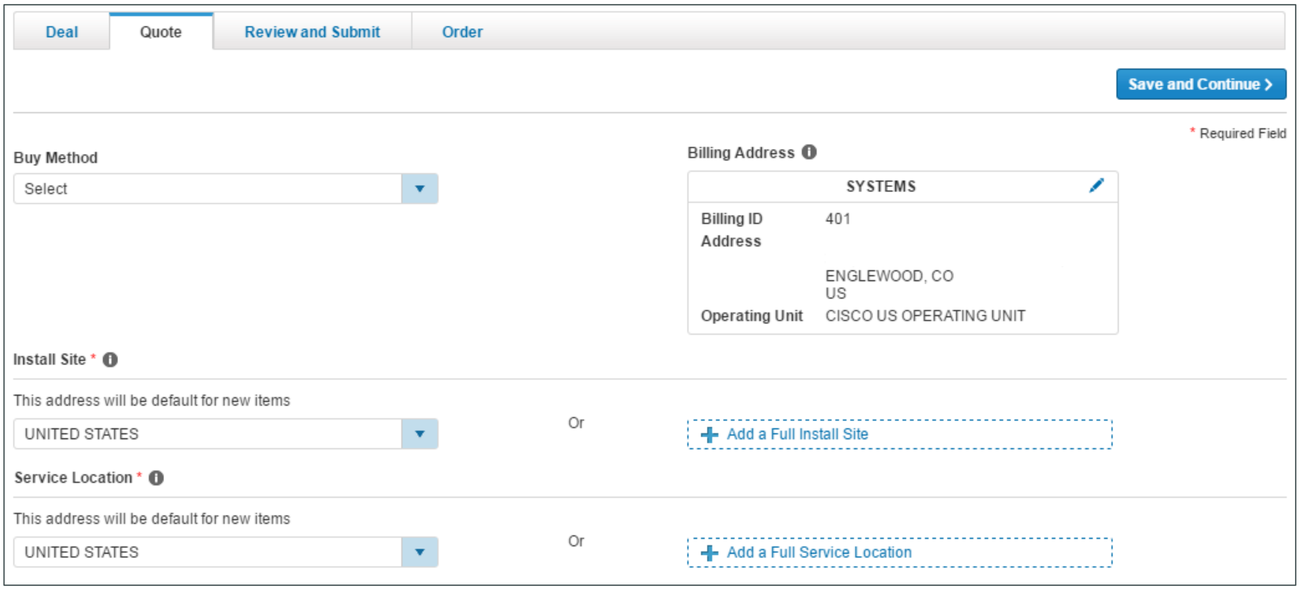
Note: The Product Family option is available for Public Sector incentives in EMEAR only.

12. Enter Expected List Amount.

Once all the information has been entered, click **Save and Continue**. The Quote tab displays.

3.6 Providing Buy Method and Install Site

There are three sections on the Quote tab: Billing Information, Buy Method, and Install Information. Specify the Service Location information if you are transacting SaaS Subscriptions.



Deals and Quotes Page: Quote Tab

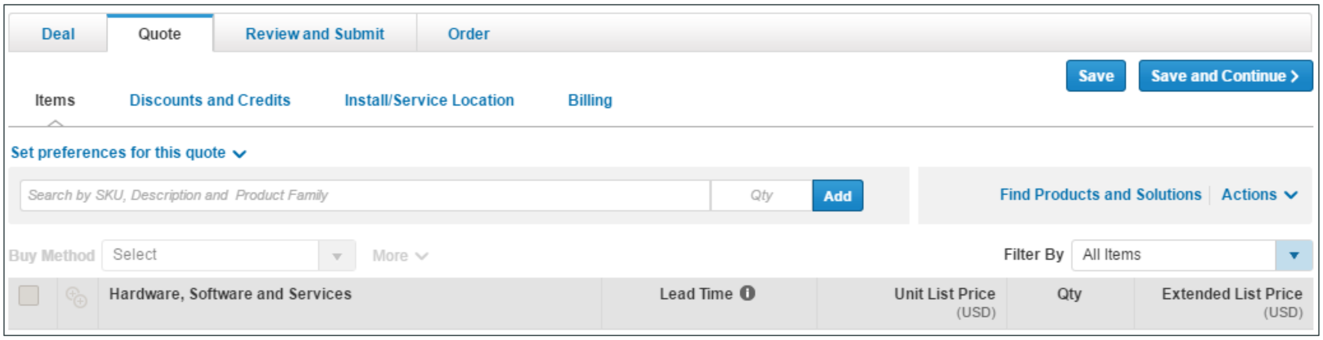
Best Practice: The billing address must be accurate to quote services correctly. If full address information is not known, the country information must be valid. Adding a full install site enables validations and pricing. It is mandatory to add a full install site if services are added.

Refer to the table below for quote tab options.

Section	Action
Billing Information	The billing information is already populated and does not require updating on this page. To change the billing information, click the edit icon. The Select a Billing Address dialog box displays. Click the appropriate radio button and click **Continue**. **Note**: Tier-1 partners placing product lease orders should enter or select the Cisco Capital bill-to address and contact. Product and service lease order capabilities are available (see Using Financing Options (For US and Canada only)).
Buy Method	From the Buy Method drop-down menu, select the appropriate option. **Note**: If the buy method is a distributor and the distributor BID and the install site ID of a quote line belong to different country pricelists, Multi-National Quoting (MNQ) discounts are applicable for the country pricelist of the install site country. The MNQ discount is applied systematically when the pricing is evoked on the quote so there is no manual process needed.

Section	Action
Install Site Information	Specify an install site. A full install site is optional at this stage; however, the minimum of a country is required. The billing country automatically populates in the Country field. The default install site for new items can be changed at any time. If applicable, click the Country drop-down arrow and click the appropriate country. To enter a full install site, click Add a Full Install Site. The Search for Install Site dialog box displays. See Populating the End Customer Section; the functionality for adding a full install site and creating a new customer address are the same.
Service Location Information	Specify the Service Location country if you are transacting SaaS Subscriptions. By default, the Service Location country will be the end customer country. If applicable, click the Country drop-down arrow and click the appropriate country. To enter a full service location, click Add a Full Service Location. The Search for Service Location dialog box displays. See Changing the Service Location Country.

1. Click **Save and Continue**. The Quote tab refreshes with four sub-tabs: Items, Discounts & Credits, Install/Service Location, and Billing.
2. The Quote tab displays the Items sub-tab by default. From this sub-tab, you can:
    - Add products (see Adding Items)
    - Add previously purchased products for service only orders (see Creating a Quote for Service-only Order)
    - Add services (see Adding Services)
    - Renew software subscriptions (see Renewing Software Subscriptions)
    - Add trade-in items (see Adding Trade-in Items)
3. From the remaining sub-tabs on the Quote tab, you can:
    - Review discounts and credits (see Reviewing Discounts and Credits)
    - Opt to review or edit the install site (see Reviewing or Editing the Install Site Information)
    - Opt to review or edit the billing information (see Reviewing or Editing Billing Information)



Quote Tab: Items Sub-Tab

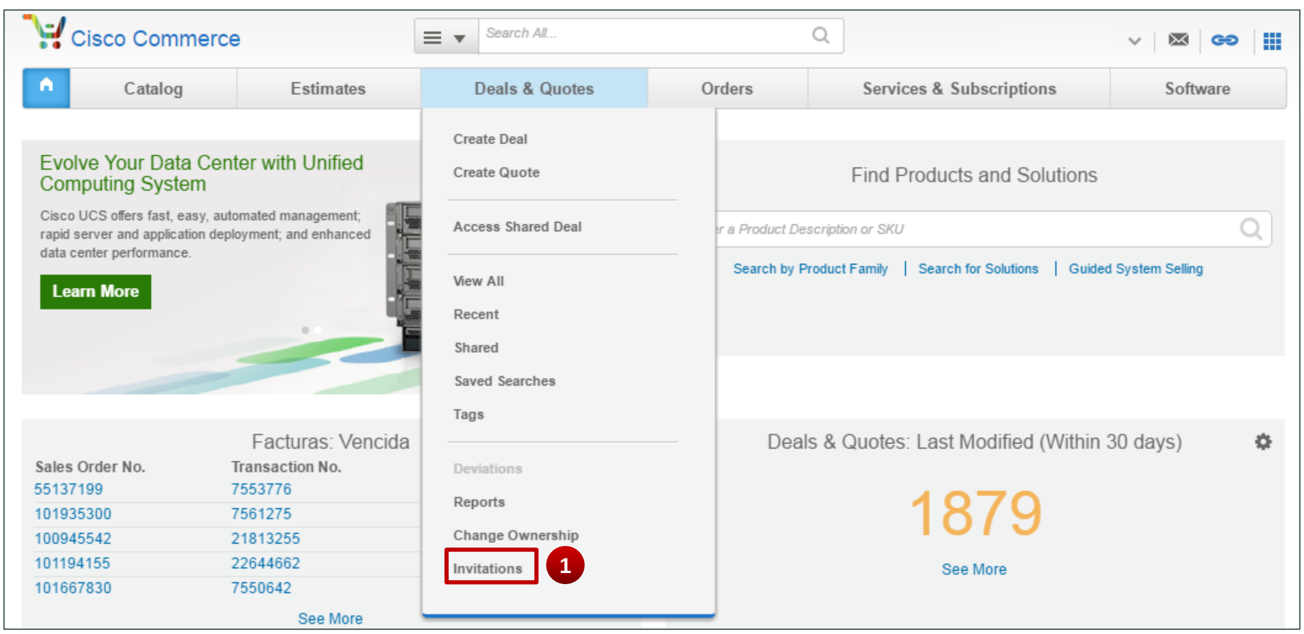
3.7 Adding Products and Services to the Deal

You can add products and services to the deal on the Items sub-tab on Quote tab. See Building a Deal.

3.8 Deal Invitations

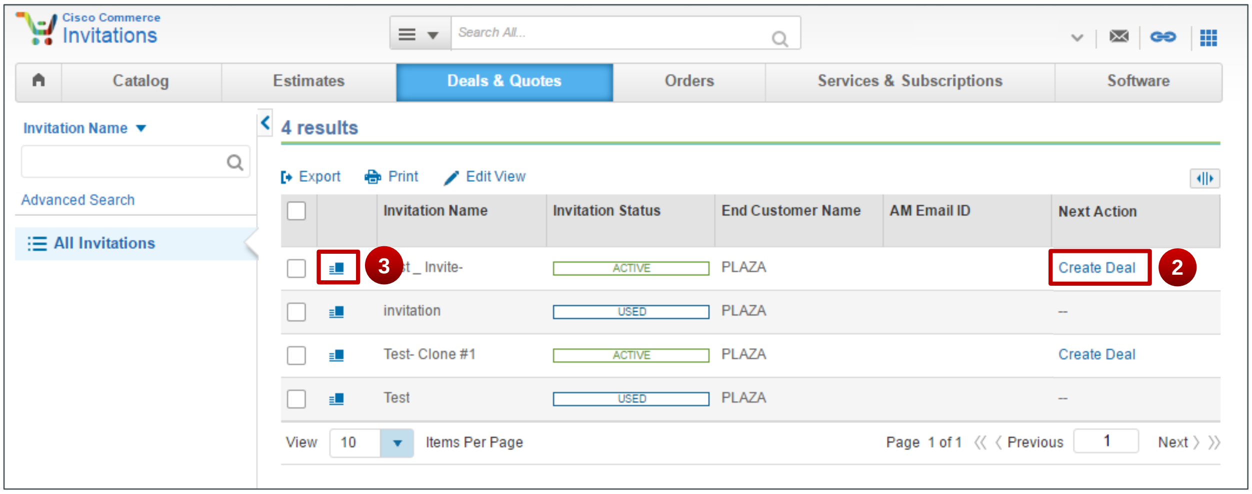
Cisco Partners have the ability to add incentives to a Cisco-initiated deal. Partners will receive an invitation, from which a deal can be created and incentives added. Follow the steps below to create a deal from an invitation.

1. From the Cisco Commerce Deals & Quotes tab, select Invitations. The Invitations records page displays.

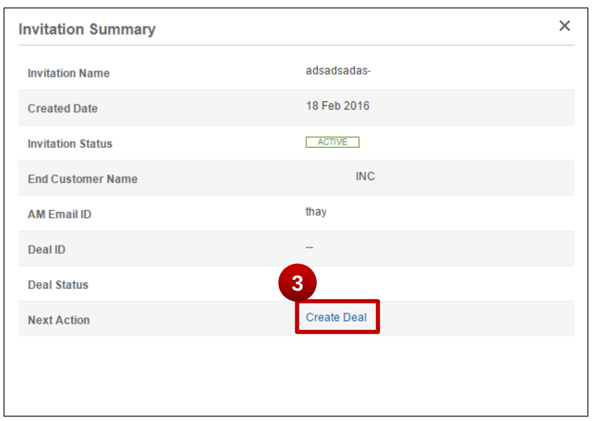


Deals & Quotes Tab: Invitations

2. Navigate to the appropriate invitation and click Create Deal.
3. Alternately, click the detail icon to view the Invitation Summary and then click Create Deal.



Invitations Records Page



Invitation Summary

Note: If the Next Action column is not displayed on the Invitations records page, click Edit View and add the Next Action column.

You can also search for an invitation by Invitation Name, AM Email ID, End Customer Name, and Invitation Status.

4. The Who's Involved Page displays. Complete the deal registration process, beginning with Populating Who's Involved.

Note: You will not be able to change the Cisco AM or End Customer on the deal.

4 Building a Deal

Best Practice: While working through the multiple sections of the Items sub-tab of the Quote tab, click **Save** periodically to ensure that work is saved. The work saves, and you remain on the current page.

Under the Quote tab, you can add items (products and services), add trade in items, review or edit the install site and billing information.

- To add items, see Adding Items.
- To add services, see Adding Services.
- To review discount and credit, see Reviewing Discounts and Credits
- To view or change install site information, see Reviewing or Editing the Install Site Information
- To view or change billing information, see Reviewing or Editing Billing Information

4.1 Adding Items

There are several ways to add items to a deal:

- Finding items using a search (see Finding Items Using a Search)
- Adding items by SKU, product description, or product family (see Adding Items by SKU)
- Importing an estimate or a configuration (see Importing an Estimate or a Configuration)

4.1.1 Finding Items Using a Search

Searching for products allows you to add multiple products to the deal at one time. There are three options for finding items using a search:

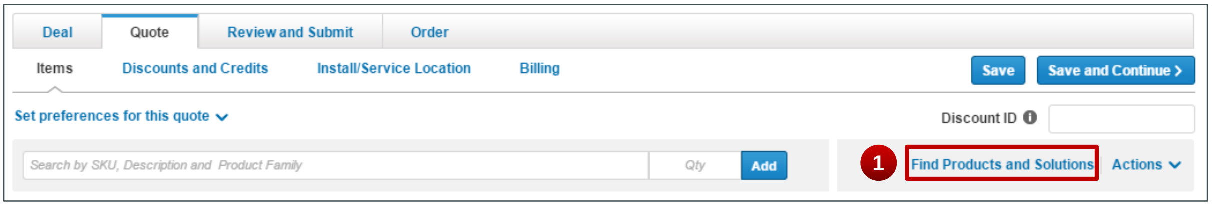
- Search and add by product description or SKU (search by product description or SKU if a specific SKU or portion of the product description is available): see Search and Add by Product Description or SKU.
- Search and add by product family (search by product family to find the product by scanning through a list of Cisco product families): see Search and Add by Product Family.
- Search and add by solution: see Search and Add by Solution.

Best Practice: If you know the product family, then use the Search and add by product family option. It makes the search easier.

4.1.1.1 Search and Add by Product Description or SKU

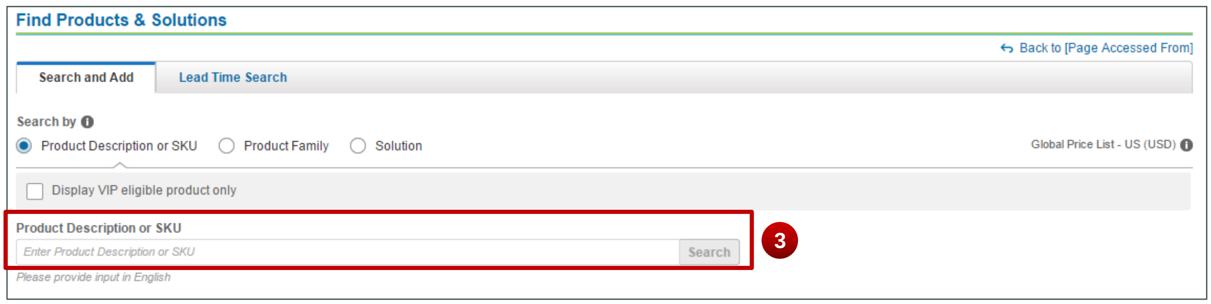
To search for items to add to the deal, complete the following steps:

1. From the Quote tab: Items sub-tab, click Find Products and Solutions. The Find Products and Solutions page displays.



Quote Tab: Items Sub-Tab – Find Products

2. Click the Product description or SKU radio button.



Find Products & Solutions Page: Search By - Product Description or SKU

3. In the search field, enter a product description, SKU, or partial SKU, and click **Search**. You do not need to enter the entire SKU.

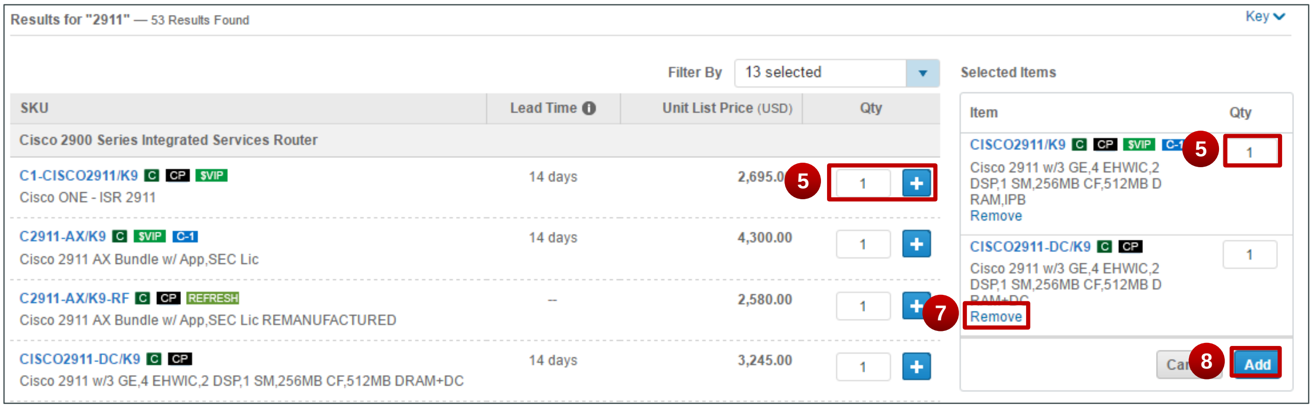
   The page refreshes to display the results.
4. Locate the appropriate product(s).
5. Enter the appropriate quantity and add the item to your cart.

Note: There are several ways to enter or change the quantity for a product.

- As listed in step 5 above.
- Add the item to your cart, then adjust the quantity in the Selected Items section.
- On the Quote tab: Items sub-tab (see Setting Quantities for Items).

---

6. Repeat steps 3 - 5 to populate the items in the deal.
7. To remove unwanted items from the Selected Items cart, click Remove.
8. When you have added all the desired products from the search to the Select Items cart, click **Add**. The Quote tab: Items sub-tab displays with the new line(s).

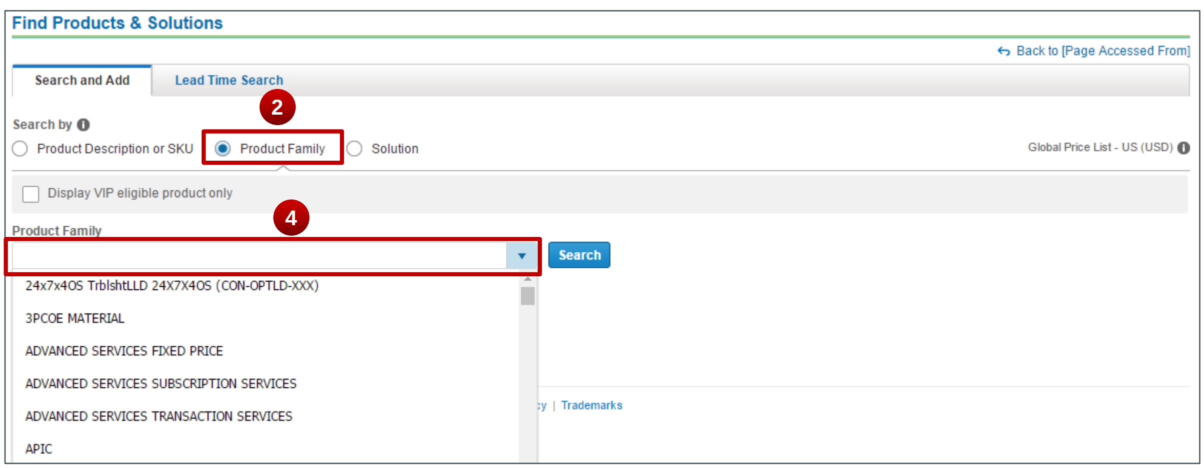


Find Products & Solutions Page: Search Results

4.1.1.2 Search and Add by Product Family

To search by product family, complete the following steps:

1. From the Quote tab: Items sub-tab, click Find Products & Solutions. The Find Products & Solutions page displays.
2. Click the Product Family radio button.
3. Click the Type to filter or click menu button drop-down arrow to see a full list of product families.
4. Scroll through the list or begin typing the product family name and then click the desired product family.



Find Products &Solutions Page: Search By – Product Family

5. Click **Search**. Results display all applicable product families.
6. Locate the appropriate product(s).
7. Enter the appropriate quantity and add the item to your cart.

Note: There are several ways to enter or change the quantity for a product.

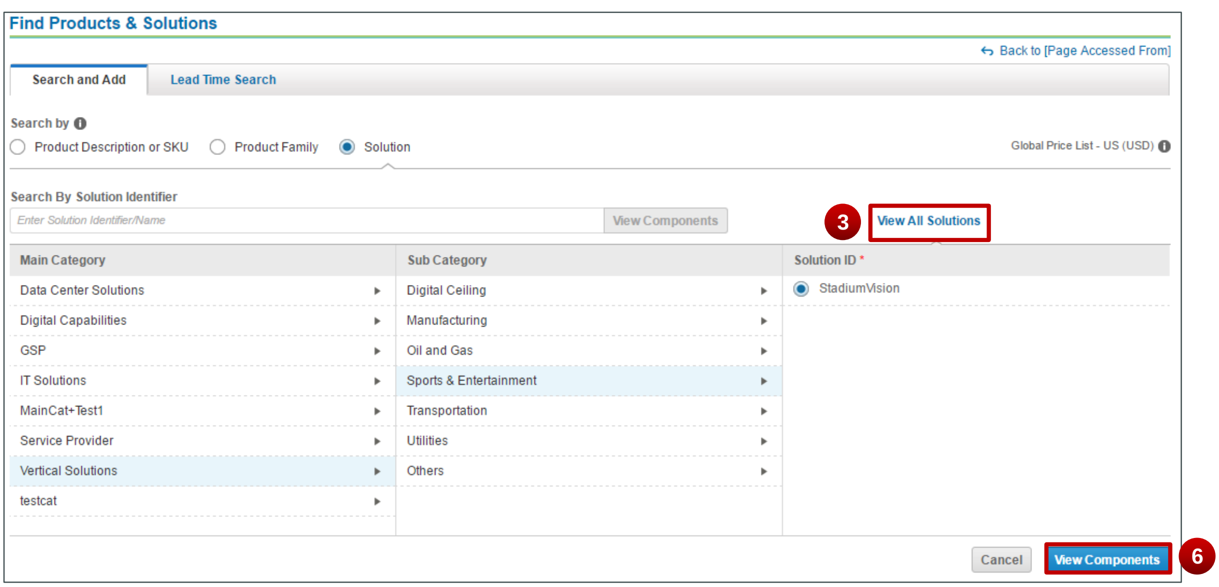
- As listed in step 7 above (entering the quantity in the Selected Items cart).
- Add the item to your cart, then adjust the quantity in the Selected Items section.
- On the Quote tab: Items sub-tab (see Setting Quantities for Items).

8. Repeat steps 3–7 to populate the items in the deal.
9. When all desired products from the search have been added to the Select Items cart, click **Add**. The Quote tab: Items sub-tab displays with the new line(s).

4.1.1.3 Search and Add by Solution

To search by solution, complete the following steps:

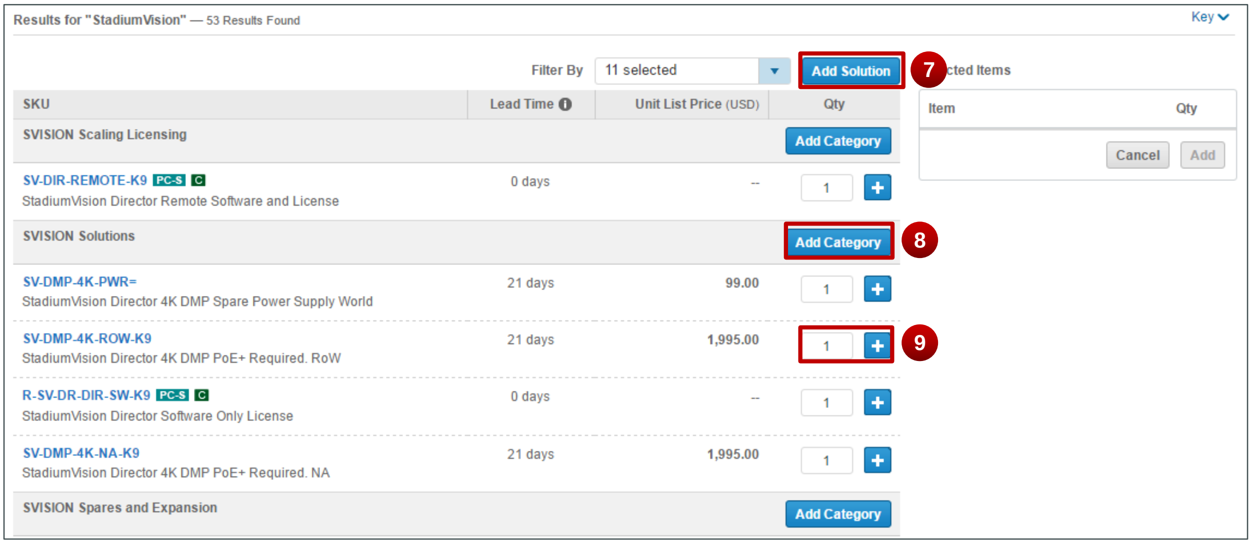
1. From the Quote tab: Items sub-tab, click Find Products & Solutions. The Find Products & Solutions page displays.
2. Click the Solution radio button.
3. Click View All Solutions to see a full list of solutions.
4. Browse through the Main Category and Sub Categories to find your desired solution.
5. Alternately, begin typing a Solution Identifier/Name in the Search field. Select the desired solution from the drop-down.
6. Once you've selected the desired solution, click **View Components** to view the associated SKUs.



Find Products &Solutions Page: Search By – Solution

7. To add the default solution to your cart, click **Add Solution**.
8. To add all SKUs in a category, click **Add Category**.

9. Alternately, you can add individual SKUs to your cart.



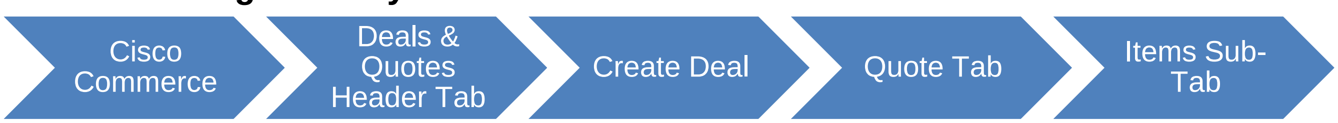
Find Products &Solutions Page: Search By – Solution

4.1.1.4 Using the Lead Time Functionality

The Lead Time Search functionality allows you to obtain lead time information for both major and minor lines. A lead time of a particular product or minor line option is the amount of time from order placement to product shipment. It is possible to search for lead times by product family, product SKU, product description, or a wild card search. You can then download or email the lead time information in either an Excel or PDF format.

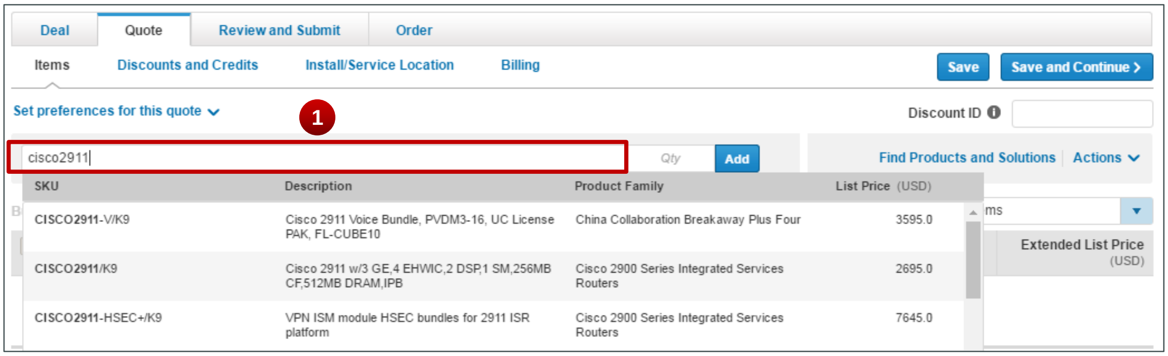
You can access the lead time tool in Quick Links also. Refer to the Getting Started with Cisco Commerce User Guide to perform a lead time search.

4.1.2 Adding Items by SKU



To add items to the deal by entering an SKU, product description, or product family without using the Find Products & Solutions tool, complete the following steps:

1. On the Quote tab: Items sub-tab, click the Search by SKU, Description, and Product Family field and enter at least three letters or numbers. A drop-down menu displays items with matching results.



Quote Tab: Items Sub-Tab - Add Product Item

2. Scroll down the drop-down menu and click an appropriate product.

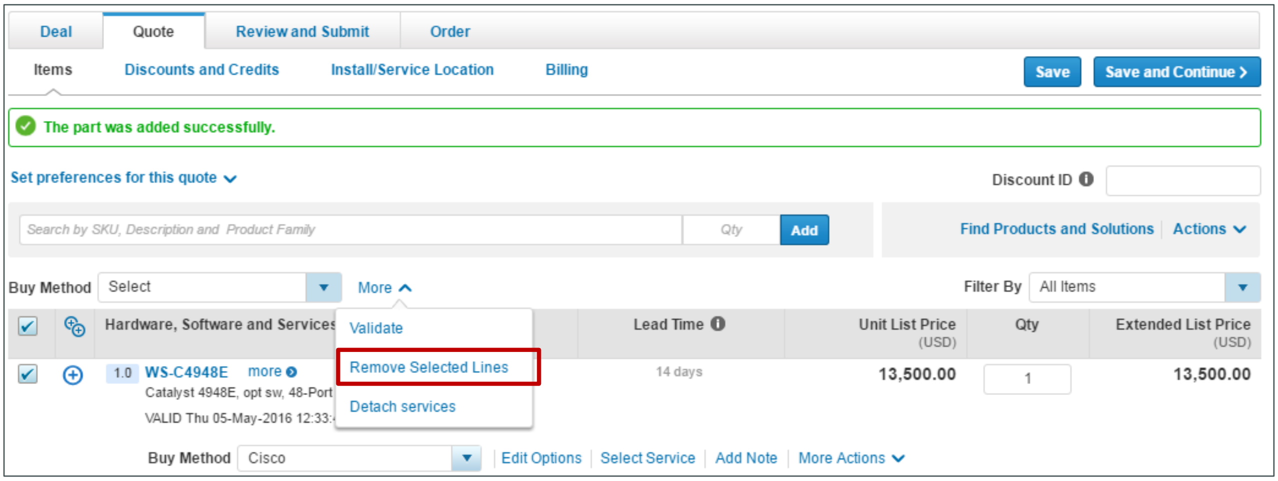
Note: To locate products that are orderable but not published on the indicated price list, enter the full SKU and press Enter. If the SKU is still not found, then the standard process to address errors applies.

Prior to contacting support, verify that the SKUs cannot be located via the auto-populate, wild card search, or general Cisco Commerce search functionalities and that the SKU in question has been published to the price list selected on the deal.

---

3. Click the Qty field and enter an appropriate quantity.
4. Click **Add**.
5. A green message displays, indicating that the part was added successfully. A new line displays the added item.
6. To continue adding lines, click **Save**. The page remains unchanged, and additional lines can be added by repeating the above process.
7. To remove a line, check the appropriate checkbox.
8. Click Remove Selected Line from the More drop-down menu.

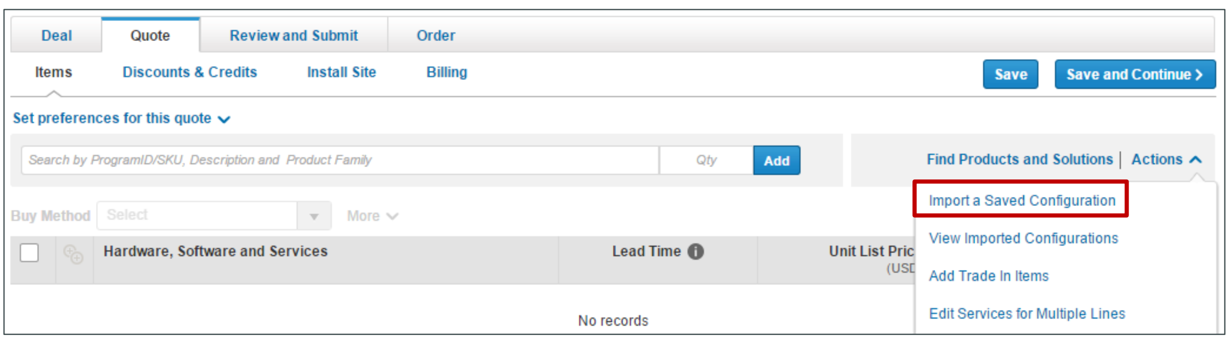
Best Practice: For items that are configurable, it is best to add services as part of the configuration. See Adding Services.



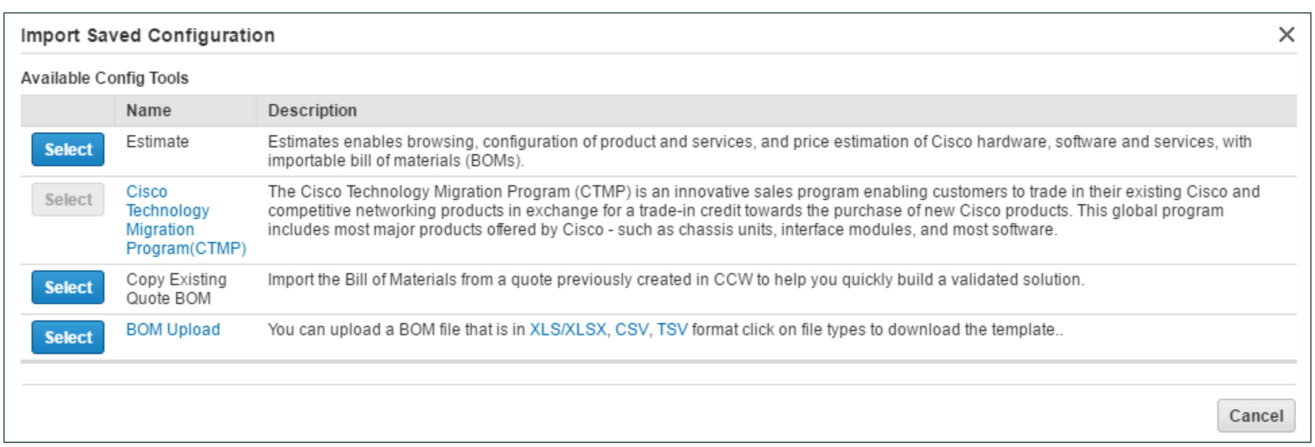
Quote Tab: Items Sub-Tab – Remove Selected Line

4.1.3 Importing an Estimate or a Configuration

Another way to add products to the deal is to import a saved estimate. Cisco Commerce Deals & Quotes tab allows for saved estimates and BOMs to be imported into the deal. Access the different tools via the Import Saved Configuration dialog box.



Quote Tab: Items Sub-Tab – Import a Saved Configuration



Quote Tab: Import Saved Configuration Dialog Box

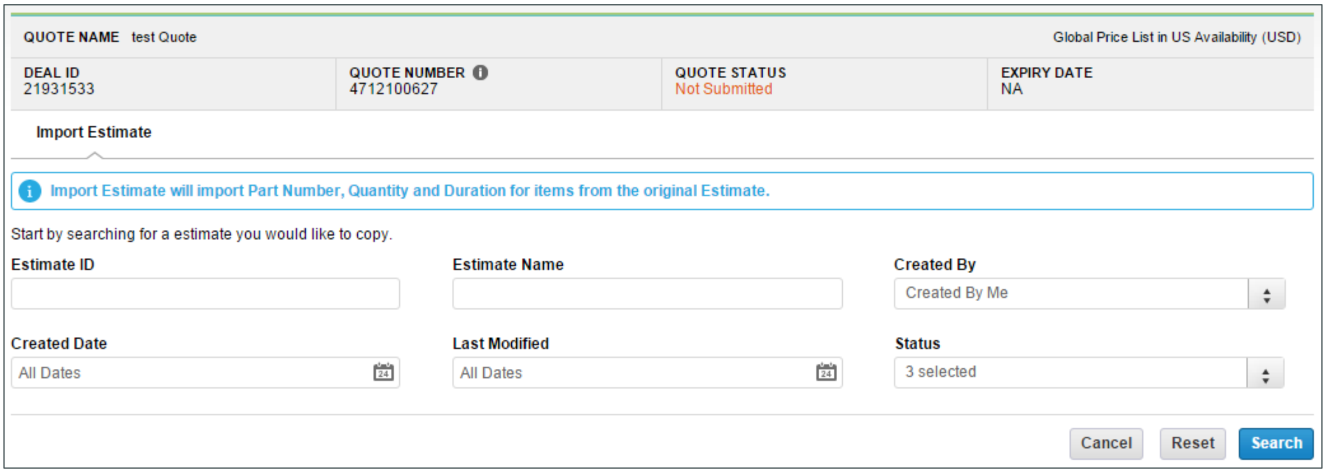
Tool	Document Section
Estimate	The Cisco Commerce Estimates application enables browsing, configuration, validation, and price estimation of Cisco hardware, software, and services, with importable Bills of Materials (BOM), as well as sharing capabilities. See Importing an Estimate.
Copy Existing Quote BOM	Import the Bill of Materials from a quote previously created in Cisco Commerce to help you quickly build a validated solution. See Copy Existing Quote BOM.
BOM Upload	You can upload a BOM file that is in XLS/XLSX, CSV, and TSV format. Use the template links available in the Import Saved Configuration dialog box to upload a BOM. See Uploading a BOM.

4.1.3.1 Importing an Estimate

You can save a configuration set from a deal and then import that saved configuration set, or estimate, into another deal.

To import an estimate, complete the following steps:

1. From the Quote tab: Items sub-tab, click to expand the Actions drop-down menu and then click Import a Saved Configuration. The Import Saved Configuration dialog box displays.
2. Click **Select** next to Estimate. The Import Estimate page will load.
3. Search for the estimate you wish to import by using the Estimate ID, Estimate Name, Created By, Created Date, Last Modified, and Status fields.
4. Click **Search**. The search results display.
5. Select the radio button associated with the desired estimate.



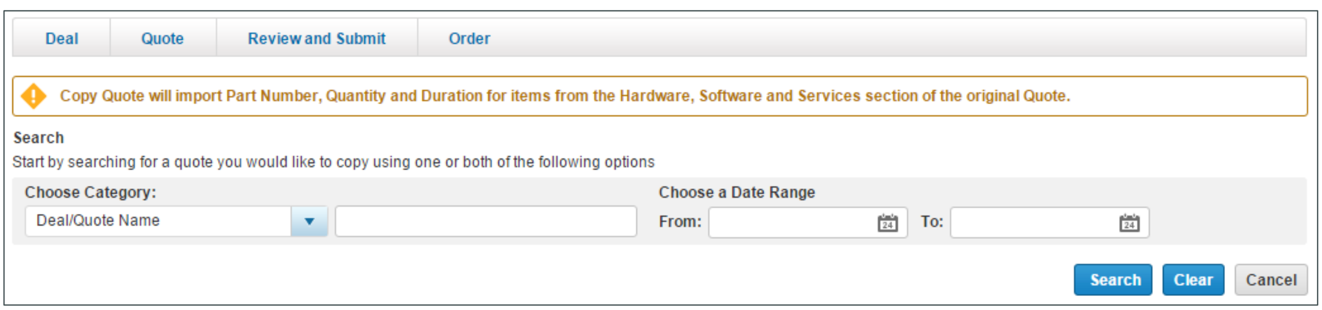
Importing an Estimate

6. Click **Continue with Selected Estimate**. The Quote tab: Items sub-tab displays the newly imported line items from the selected estimate.

4.1.3.2 Copy Existing Quote BOM

To copy a quote, complete the following steps:

1. From the Quote tab: Items sub-tab, click to expand the Actions drop-down menu and then click Import a Saved Configuration. The Import Saved Configuration dialog box displays.
2. Click **Select** next to Copy Existing Quote BOM.
3. Select the parameters for search and enter the appropriate text in the search field.
4. Click **Search**. The search result displays.
5. Select the appropriate option from the search results.



Copying a Quote: BOM Page

6. Click **Copy**. The Quote tab: Items sub-tab displays the newly imported line items.

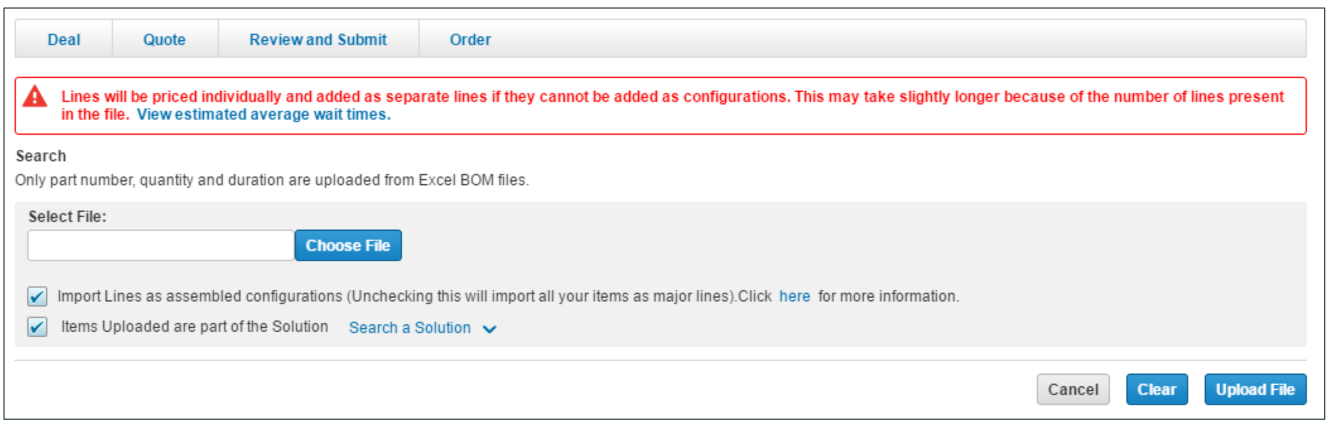
4.1.3.3 Uploading a BOM

To upload a BOM, complete the following steps:

1. From the Quote tab: Items sub-tab, click to expand the Actions drop-down menu and then click Import a Saved Configuration. The Import Saved Configuration dialog box displays.
2. Click **Select** next to BOM Upload.
3. Click **Choose File**.
4. Locate the appropriate file and click **Open**.

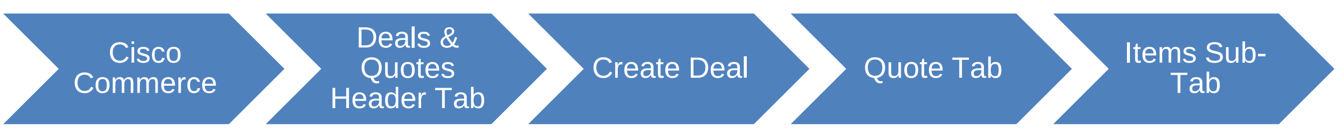
Best Practice: Use the available templates in XLS/XLSX, CSV, and TSV format to upload a BOM. The template links are available in the Import Saved Configuration dialog box.

5. Check the checkbox for Import lines as assembled configurations. Unchecking this box will import all configurations to your deal as major lines.
6. Optionally, check the checkbox to indicate that uploaded items are part of a solution. You can search for the solution using the drop-down menu.
7. Click **Upload File**. A progress bar indicates the percent complete. The Items sub-tab displays the imported BOM as line items.



Importing a BOM

4.2 Adding Different Types of SKUs



You can add different type of products, services, and configurations to the deal on the Quote tab: Items sub-tab before moving to the Discounts tab.

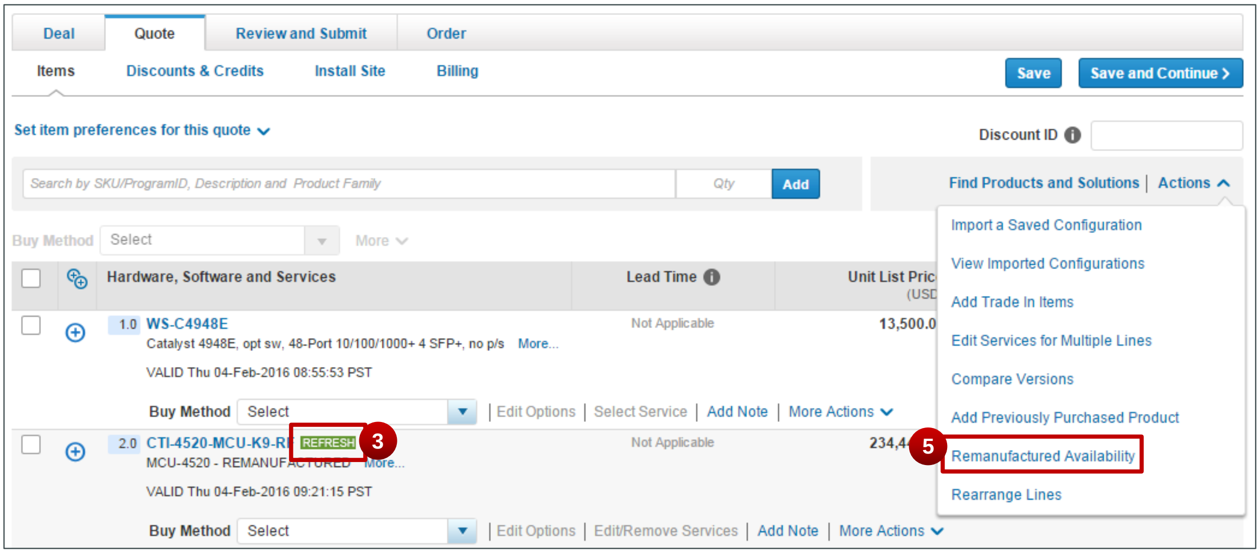
4.2.1 Adding Remanufactured Equipment

You can add remanufactured equipment (also known as Refresh), to a quote and/or an order with the applicable services.

1. Add remanufactured products using any of the methods for adding items. See Adding Items.

2. To configure products, see [Choosing Options and Resolving Issues](#).

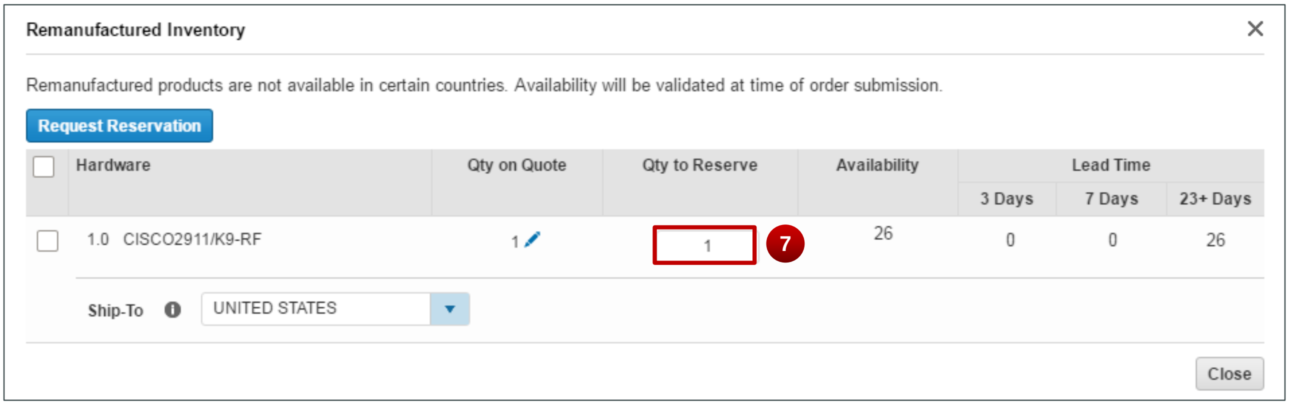
Note: Some remanufactured products require a power cord. For those products, you must select the correct power cord for your country prior to submitting the deal for approval.



Quote Tab: Items Sub-Tab

3. Hover over the REFRESH icon to view the new equivalent product SKU and price. The icon will display only for remanufactured products.
4. To view available inventory and shipment lead times expand the Actions drop-down menu and then click Remanufactured Availability. The Remanufactured Inventory dialog box displays.
5. From the Ship-To: drop-down, select the appropriate country. The drop-down default is based on the ship to or end customer country from the deal.
6. View the available remanufactured inventory and shipment lead time.

Note: If the Quantity Available is zero, the product is not available. A three-day shipment lead time applies to shipments from in-country warehouses. A seven-day shipment lead time applies to shipments from out-of-country warehouses. The inventory found in the 23+ days shipment lead time represents inventory that can be remanufactured to meet the request.



Remanufactured Inventory Dialog Box

7. If an inventory reservation is required, enter the Quantity to Reserve.
8. Click the pencil icon to change the quantity of product on the quote. You will receive email notification when the extra reserve quantity has been released.
9. Check the check-box for the item to reserve and click **Request Reservation**.
10. A success message displays. You will receive a copy of the e-mail sent to the Remarketing Sales Manager (RSM) requesting the reservation.
11. Upon RSM approval of the reservation request, an email confirming the quantity reserved and expiration date will be sent. Inventory is reserved for 14 days, at which point the inventory is released. A reminder email is sent two days prior to the expiration date.

Note: Remanufactured equipment cannot be shipped to LATAM countries, Korea, Sudan, or Iran.

4.2.2 Adding Fixed Scope Consultancy SKUs

You can quote and order Fixed Scope Consultancy services only in Cisco Commerce. There are two types of Fixed Scope Consultancy services:

- Installations
- Network Optimization

These services are fixed price, fixed scope, and fixed duration. Therefore, Fixed Scope Consultancy services will always be purchased at net price. To add technical services, see Adding Services.

Fixed Scope Consultancy SKUs can be added as a separate line, or configured as an option for eligible software offers (see Choosing Options and Resolving Issues).

To add Fixed Scope Consultancy SKUs, complete the following steps:

1. From the Quote tab: Items sub-tab, click the Search by SKU field and enter “ASF-“. A list of Fixed Scope Consultancy SKUs display.
2. Select the desired SKU.

3. Verify the quantity is correct depending on the SKU and click **Add**. The Fixed Scope Consultancy line is added to the line items of the deal.
4. Ensure the buy method is correct.

Best Practice: Contact information for Fixed Scope Consultancy SKUs must be accurate and should be the contact with whom a project team will work to schedule the installation. In most cases, this is not the Ship To contact.

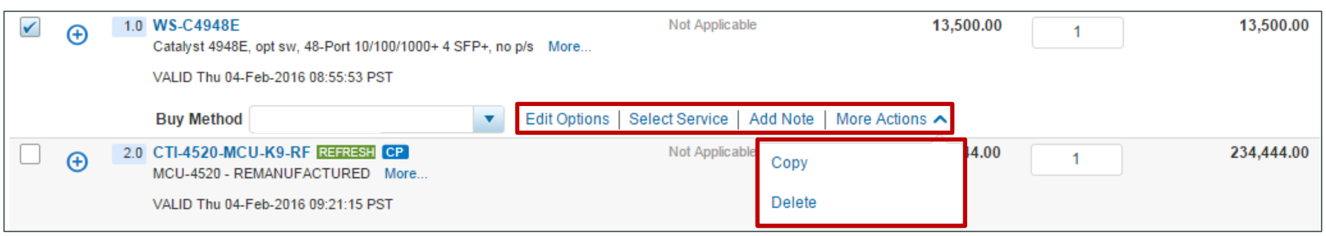
Providing accurate information results in seamless delivery.

4.2.3 Adding Cisco Integrated Customization Services (CICS) SKUs

CICS (also referred to as Silver-level License SKUs) can be added to a quote, but the process can only be completed once the quote is converted to an order (and the Attach Template button becomes active). CICS require files to be attached in the order and this step cannot happen as part of the quote process. See Getting Started with Cisco Commerce User Guide for more information on completing this process.

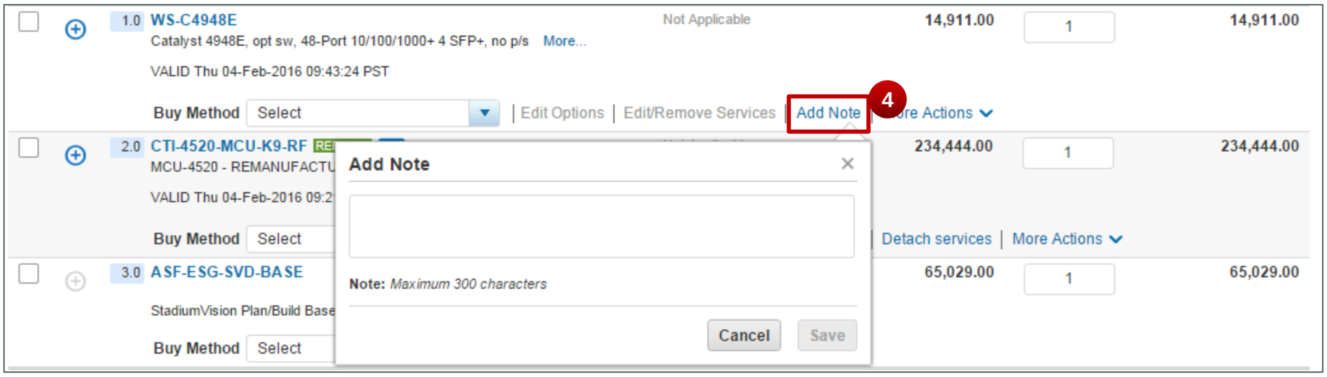
4.3 Using Optional Functions for Individual Line Items

You can use additional options for an individual line to copy, add notes, and delete, among other actions.



Quote Tab: Items Sub-Tab - Optional Functions for an Item

- Copying Line Items: To copy a line item click Copy. A new, identical line item with the same attributes displays on the deal.
- Deleting a Line Item: To delete a line item, click Delete. The line item is removed from the quote.
- Select or Edit Options: See Choosing Options and Resolving Issues.
- Select Services or Edit/Remove Services: See Adding Services.
- Select a buy method for each item.

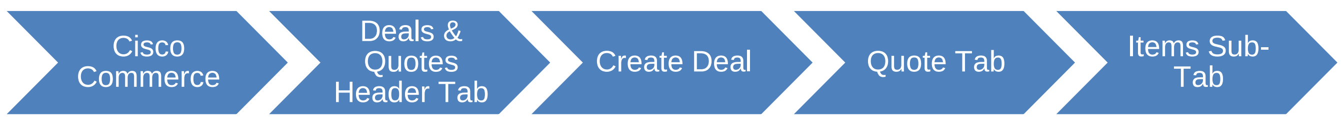


Quote Tab: Items Sub-Tab - Optional Functions for an Item

- User Notes: Follow the steps below to add a user note for your own personal reference:
  1. Click Add Note under the appropriate line item. A text field displays.
  2. Click the text field. Enter up to 300 characters.
  3. Click **Save**. The text field closes.
  4. To change the user note, click Edit Note. The note displays.
  5. Edit the user note and click **Save**.
  6. To remove the user note, click Edit Note. The note displays. Click **Delete**.

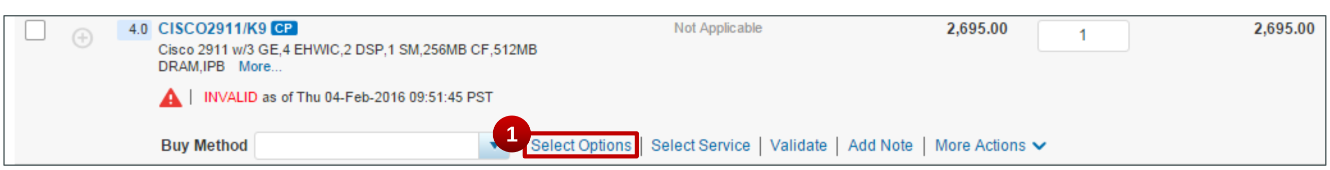
Note: These notes are for your personal use only and are not reviewed by the Customer and Partner Services (CPS) team.

4.4 Choosing Options and Resolving Issues



When a product requires additional configuration, select the appropriate options and resolve any issues so that the product is properly configured. Select Options is active under products that require additional configuration.

Note: Edit Options displays for products already configured. However, you can select new options.



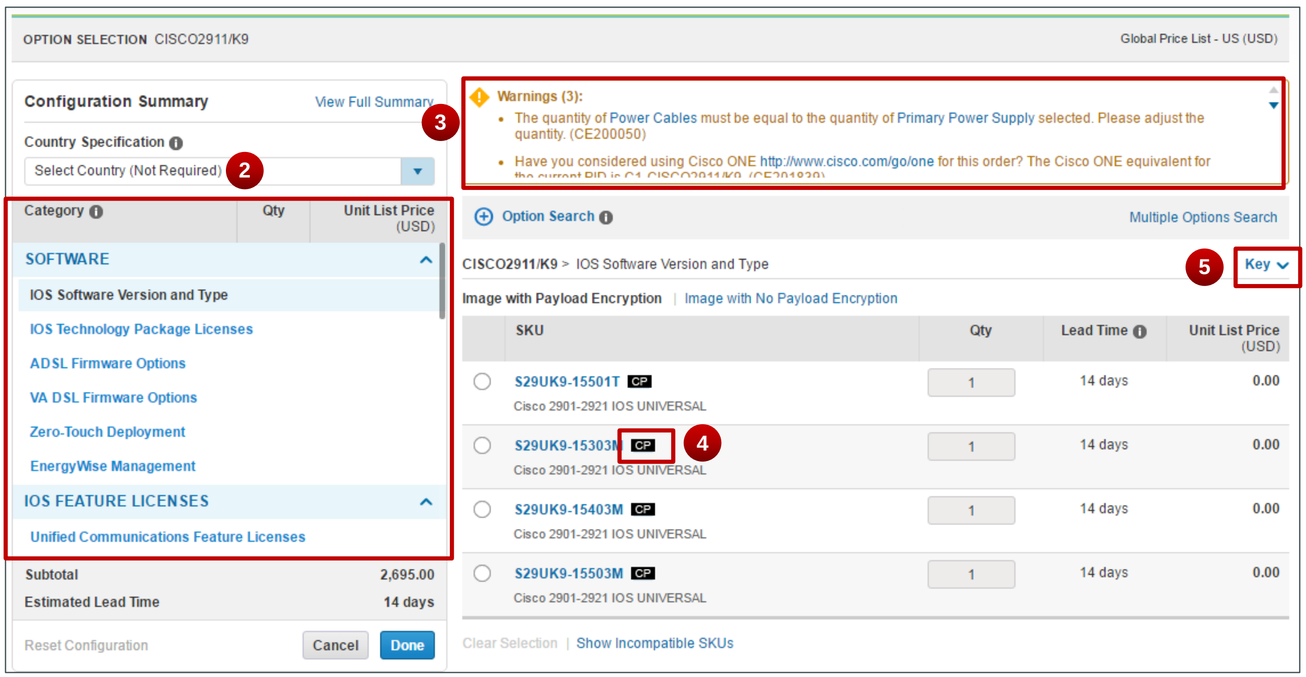
Quote Tab: Items Sub-Tab

To select options, configure products, and resolve any warnings or errors in the configuration, complete the following steps:

1. From the Quote tab: Items sub-tab, click Select Options below the line item that needs to be configured so it can become valid. The Option Selection page displays.

   The configuration can be completed for multiple options, individual options, when the SKUs are known, and when the SKUs are not known.

   - If the SKUs for the required items are known, use the multiple option search function to enter the SKUs in a list and have all results display on the page (see Searching for Multiple Known SKUs).
   - To search for a known SKU one at a time, use the Option Search tab or search for a SKU manually through the system of links and messages (see Searching for a Single Known SKU).
   - If the SKUs are not known or to search by each required component, use the individual search function (see Searching Unknown SKUs Individually).



Option Selection Page

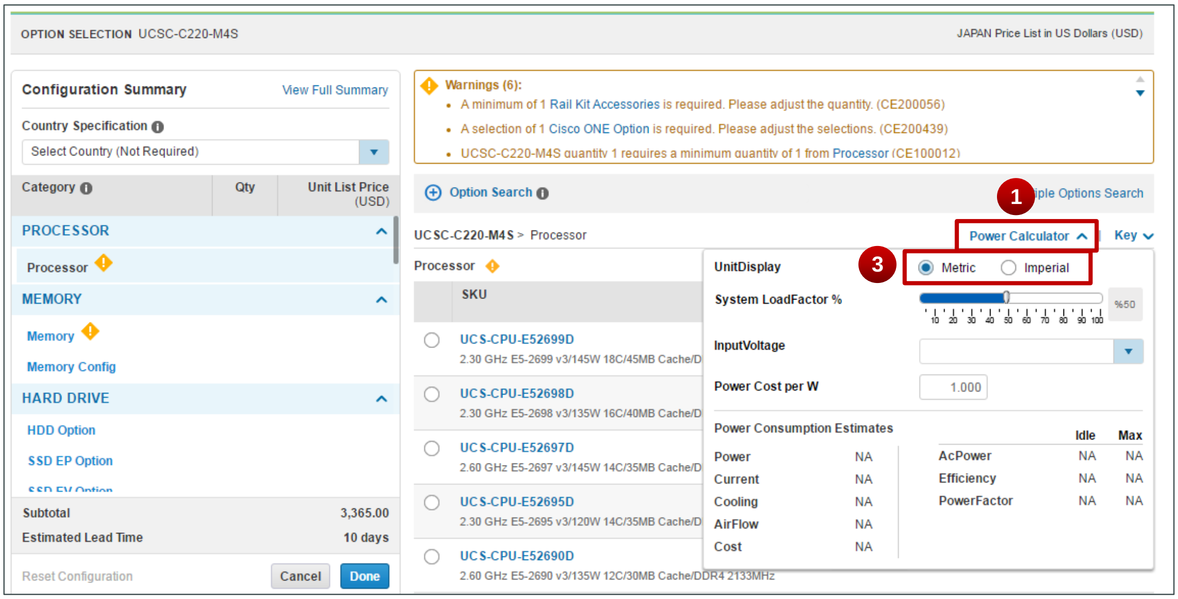
2. Review the product list displaying on the left of the page in the Configuration Summary pane.
3. Attend to the warning or error messages displaying at the top of the page indicating corrections within the configuration. You cannot submit the order without completing the configuration.
4. Some of the options have icons next to them. These icons give additional information about the corresponding option. Hover over the icon to view related information.
5. Click the Key drop-down to view icon-related information.

4.4.1 Using the Power Calculator

Power Calculator option is only applicable to Unified Computing System (UCS) products and identifies the electrical power consumption of products to make better selection.

To view the power consumption information for a UCS product, complete the following steps:

1. Select the appropriate option and click Power Calculator drop-down arrow to view the consumption.



Option Selection Page – Power Calculator

2. A legal disclaimer displays. Click **Accept** to view the power consumption details.
3. Click Metric or Imperial to view appropriate units in the power calculator drop-down menu.
4. Click again on Power Calculator to close the drop-down menu.

4.4.2 Searching for Multiple Known SKUs

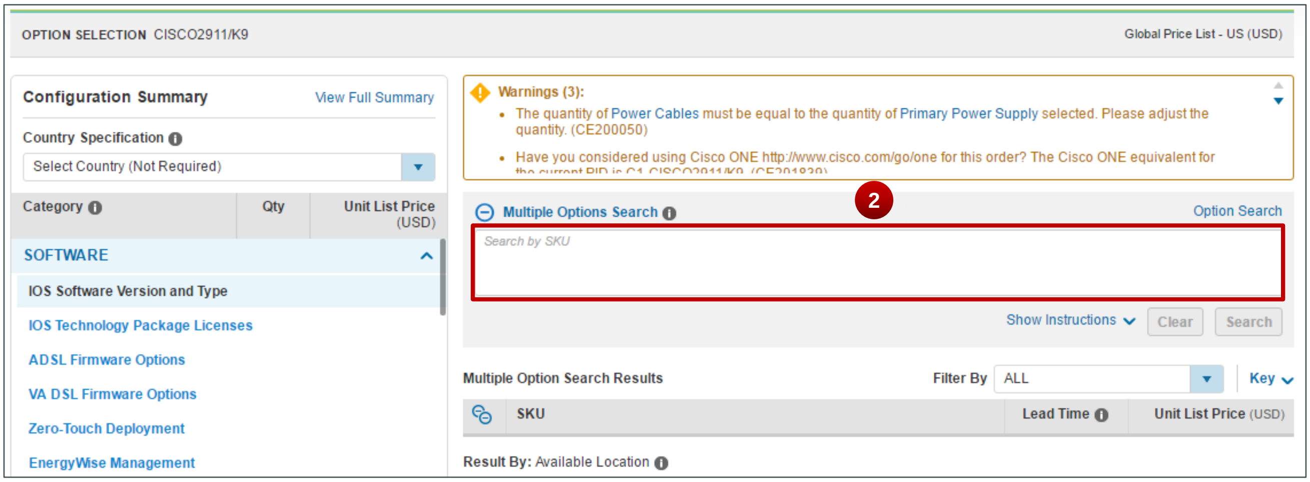
Cisco Commerce > Deals & Quotes → Create Deal > Quote Tab → Populate Deal > Select Options → Option Selection Page

To search for multiple known option SKUs at a time, complete the following steps:

1. From the Option Selection page, click Multiple Options Search. The content on the right of the page refreshes and displays the Multiple Options Search section. Click Show Instructions for support and examples.
2. Click the text box and enter SKUs and respective quantities. Copy and paste information from another source or enter the information manually if needed.

Note: Enter the SKU and respective quantity; separated by a space, a comma, a tab, or a semi-colon on the same line, one SKU per line.

Enter the product items in a column. Do not enter the product items in a list separated by commas.

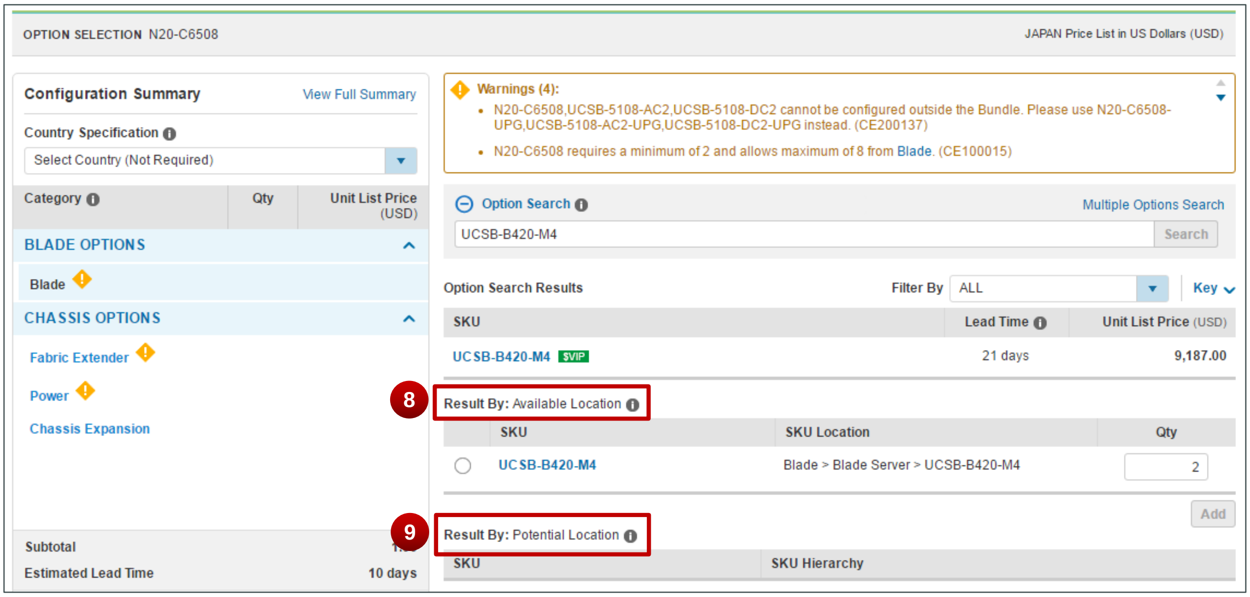


Option Selection Page: Multiple Options Search

3. Click **Search**.
4. The search results display at the bottom of the under Result: By Available Location, Result: By Potential Location, and Result: Not available. Search results include estimates lead times, SKU list prices, and locations (available and potential).

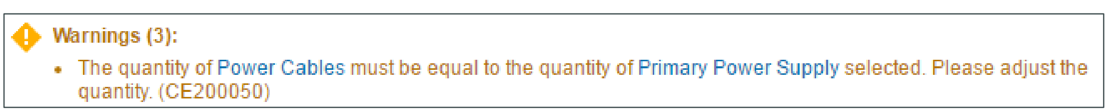
   Some of the results have icons next to them. These icons give additional information about the corresponding option. Hover over the icon to view the information.
5. From the search results under Available Location section, check the checkbox(es) corresponding to the desired items.
6. Errors with the indicated quantities display above the Multiple Options Search tab. Click each link to resolve the error. Once the quantity errors are resolved, the items are added to the configuration.

Note: Some *Qty* fields are editable and some are not. If the *Qty* field is populated and greyed out so that you cannot make edits, the quantity is controlled by the system according to the rules of quantity limitations.



Multiple Option Search Tab: Search Results

7. Click **Done**. The Order page displays.
8. Available Location indicates the path to the SKU(s) under the Configuration Summary pane on the left side of the page. Items can be added to the configuration by leaving the appropriate checkbox (es) checked. To remove a product from the list of items to add, uncheck the checkbox corresponding to that product.
9. The Potential Location indicates a possible path to the indicated SKU(s) under the Configuration Summary pane on the left side of the page. Items cannot be added to the configuration from this section. Click the link within the indicated path and select the appropriate product.
10. If there are any error messages associated with a SKU, the error message displays at the top of the page and the SKU displays under Results: Not available. These SKUs are not selectable.
11. Hover over the information icon to learn more about available and potential locations.

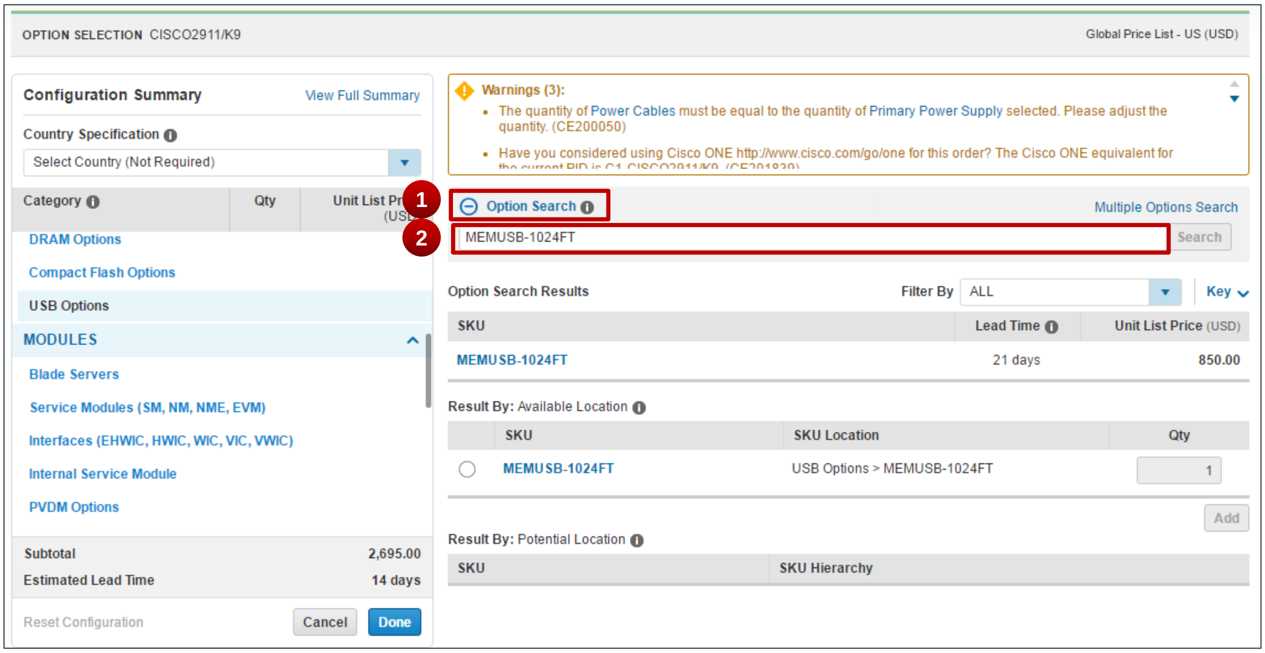


Option Selection Page: Quantity Error Messages

4.4.3 Searching for a Single Known SKU

To search for a single known SKU, complete the following steps:

1. From the Option Selection page, expand the Option Search section.
2. Click the Option SKU field and enter the SKU.



Option Selection Page: Option Search Tab

3. Enter the SKU and a drop-down menu displays all the available options based on what was entered. Select the desired SKU from the drop-down list.

   Once the correct SKU has been entered into the field, click **Search**. The Option Search tab displays and the Option SKU field is automatically populated.

4. Click **Search**. The search results display at the bottom of the page under Result: By Available Location, Result: By Potential Location, and Result: Not available. Search results include estimates lead times, SKU list prices, and locations (available and potential).

   Some of the results have icons next to them. These icons give additional information about the corresponding option. Hover over the icon to view the information.

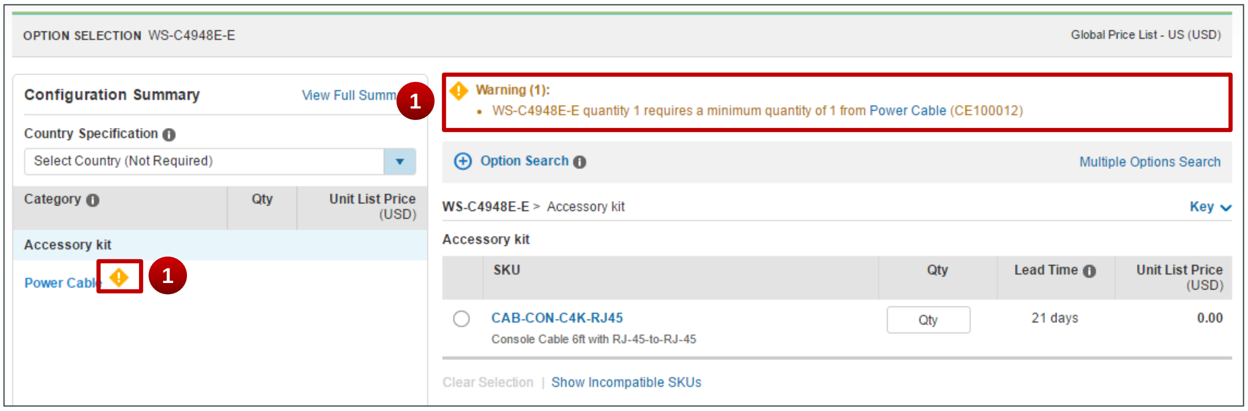
5. Click the radio button corresponding to the SKU.
6. Click **Add**.

4.4.4 Searching Unknown SKUs Individually

To select options, configure products, and resolve any warnings or errors in the configuration without knowing the SKUs needed, complete the following steps:

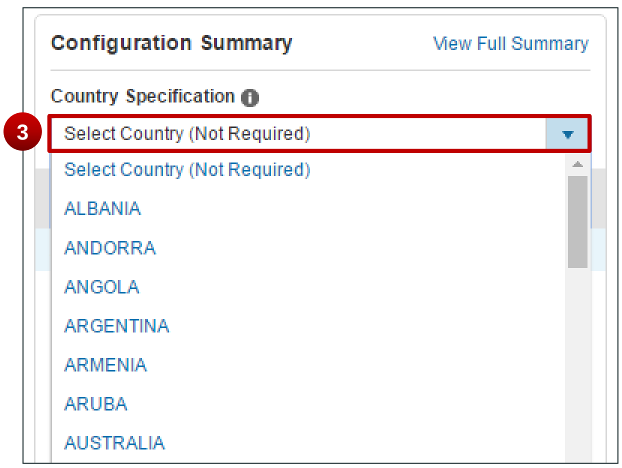
1. From the Quote tab: Items sub-tab, click Select Options below the line item. The Option Selection page displays.

   Options that require additional configuration have an orange icon next to them and are identified at the top of page above the Option Search section.



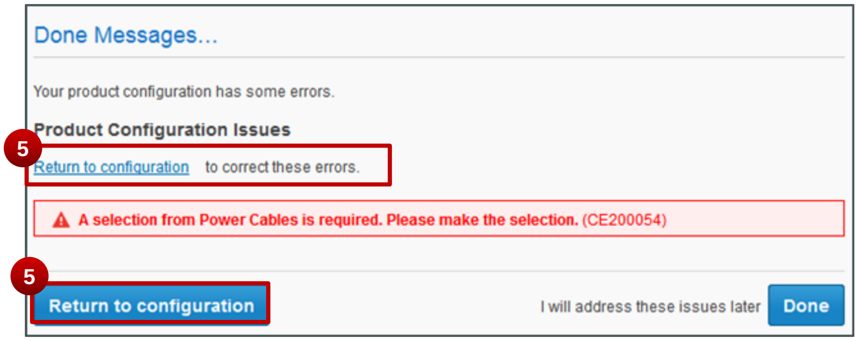
Option Selection Page

2. Scroll through the Configuration Summary pane. Using the warning messages at the top of the page as a guide, click the appropriate link within the message to resolve each warning or error. Click the appropriate option(s). Continue this process until all issues have been.



Option Selection Page: Country Specification Feature

3. Click the Country Specification drop-down arrow in the Configuration Summary pane and click the appropriate country. The system will then filter the products based on the country selection, making it easier and faster to configure products correctly.
4. Click **Done**. If issues remain, an error message displays in the Done Messages dialog box. Upon clicking Done in the Done Messages dialog box, the Items tab displays a confirmation message indicating that the changes have been saved.
5. To correct the error(s), click the Return to Configuration button or link.

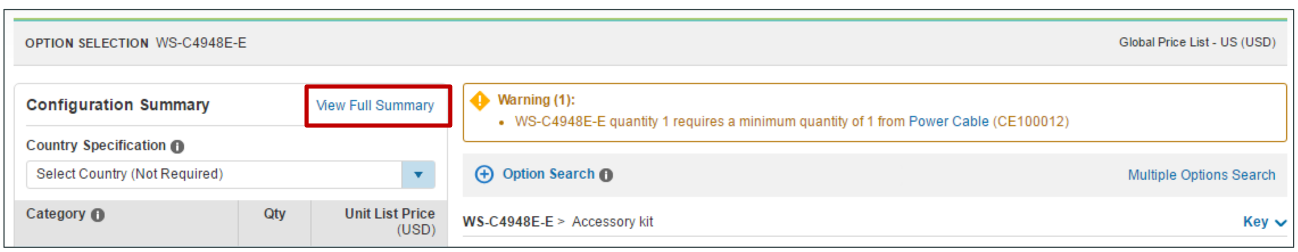


Done Messages Dialog Box

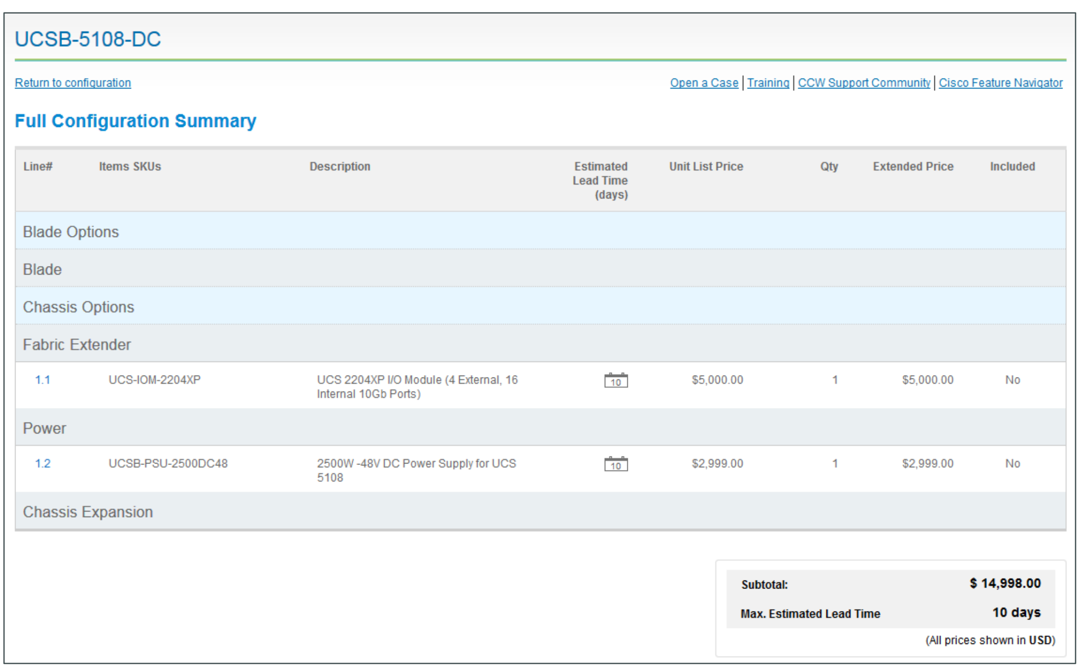
4.4.5 Viewing Full Summary

You have the option of viewing a summary page of the configuration with the selected options.

From the Option Selection page, click View Full Summary. The page refreshes to display the Full Configuration Summary.

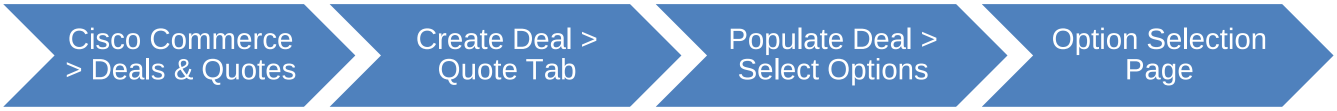


Option Selection Page: Configuration Summary Pane



Option Selection Page: Full Configuration Summary

4.4.6 Using Cisco Feature Navigator

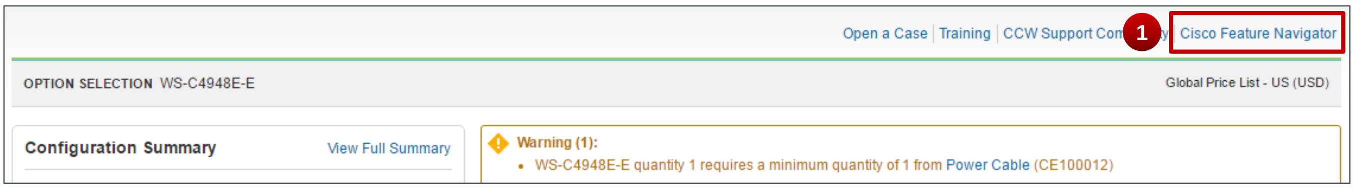


The Cisco Feature Navigator helps you to find the best software solution for the selected hardware. By using this function, you can find the right product based on software or feature needs.

To access Cisco Feature Navigator, complete the following steps:

1. From the Option Selection page, click Cisco Feature Navigator.

   The Cisco Feature Navigator page displays in a new window.



Option Selection Page: Cisco Feature Navigator

2. To return to Cisco Commerce, close the new window.

   There is no navigation back to Cisco Commerce from the Cisco Feature Navigator page.

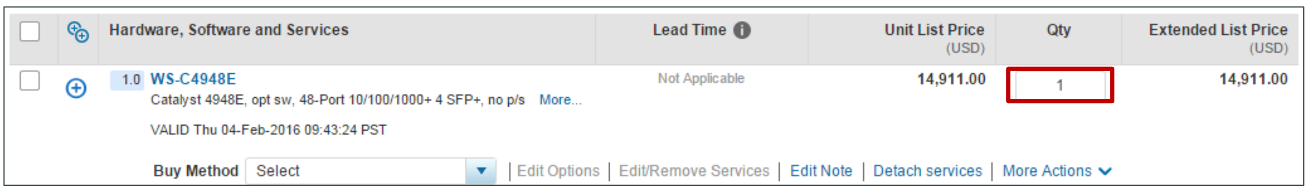
Cisco Feature Navigator Page

4.5 Setting Quantities for Items

You can add quantities of items when adding them to the Items tab or when they are already added to the Items tab.

Note: The Qty field in Cisco Commerce Deals & Quotes tab accommodates up to nine digits, for example, 1234567891.

To change the quantity for each of the items, enter the desired number of items or options in the Qty field for that line and press **Enter**. For multiple items and options, repeat this step for each item. The extended list price is the price per unit multiplied by the quantity.



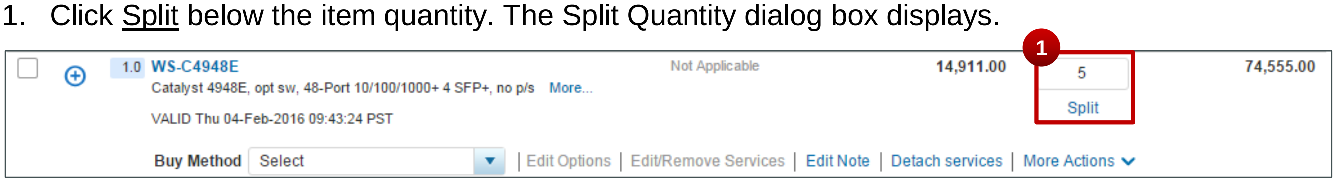
Quote Tab: Items Sub-Tab – Qty Field

4.5.1 Splitting Quantity of Items

You can split quantity of items for configuration, adding different services or ordering partial quantity.

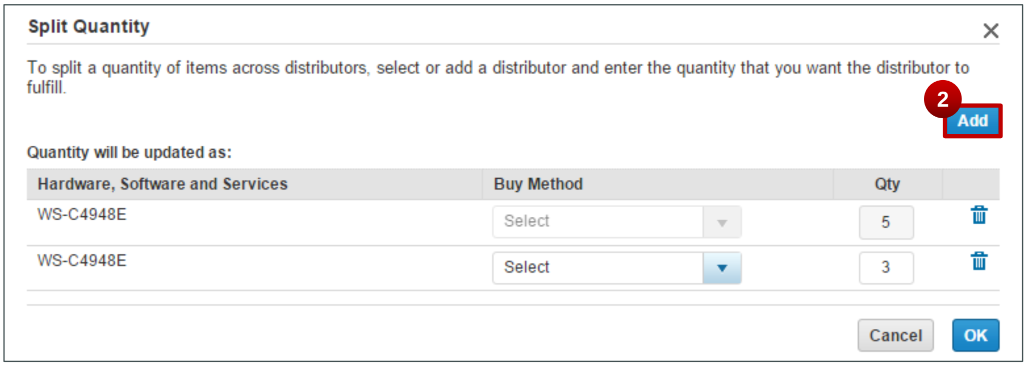
To split quantity of an item, complete the following steps:

1. Click Split below the item quantity. The Split Quantity dialog box displays.



Select Items to Order Page

2. Click **Add** to add a distributor to whom the updated quantity will be assigned. The dialog box refreshes.
3. Type the quantity in the new line.
4. Alternately, click the delete icon to remove a newly added line.
5. Click **OK**. The Items sub-tab refreshes to display the new line with split quantity.



Split Quantity Dialog Box

4.6 Adding Services

There are various types of Cisco service offerings:

Technical services are always attached to hardware or software product. They can either be ordered at the point of sales (in Cisco Commerce) or purchased separately as a service only line (either in Cisco Commerce or CSCC).

Note: Standard durations for technical services can be between one and 60 months and appropriate multi-year discounts will apply.

Note: Service renewals for technical services are not transacted in Cisco Commerce, nor are contract management tasks performed. You must use CSCC for these transactions.

Advanced Services (AS): Each type of Advanced Service has different deliverables, delivery model, as well as ordering rules. Not all are orderable within Cisco Commerce.

- AS Transaction (AS-T): These cannot be ordered within Cisco Commerce, you must fax this order.
- AS Subscription (AS-S): These cannot be ordered within Cisco Commerce, you must use CSCC to quote and order.
- AS-Fixed (AS-F): These services have a fixed scope, fixed price, and fixed cost and are orderable with Cisco Commerce. For more information on ordering AS-F SKUs in Cisco Commerce Deals & Quotes tab, see Adding Fixed Scope Consultancy SKUs.

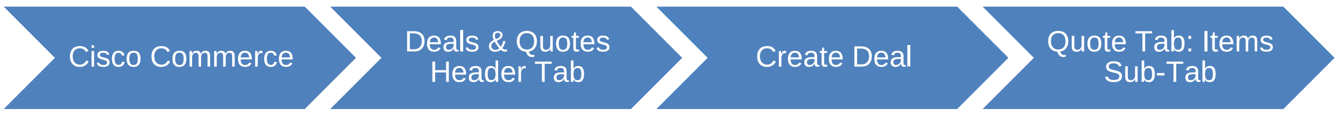
You can add services to items as part of the product quoting process. Services for previously ordered products can also be ordered separately as a service-only quote, later converted to an order. See Creating a Quote for Service-Only Order.

Best Practices: Add services as part of the product configuration within your quote or order, rather than as a separate service-only line item.

For more information on Cisco services, you can reference:
http://www.cisco.com/web/partners/services/index.html

For more information on CSCC, see:
http://www.cisco.com/web/services/resources/cscc/training/index.html

4.6.1 Setting Default Services Options



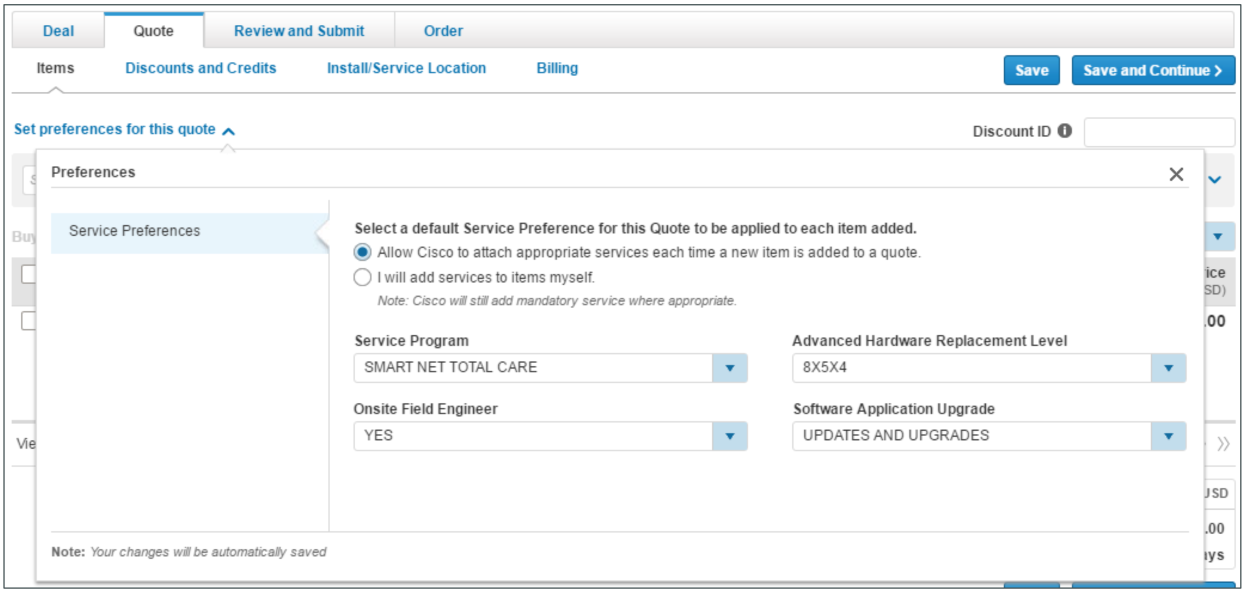
Within your Cisco Commerce My Profile and Preference section, you can select your default service choices, as well as determine whether you would like Cisco Commerce to automatically add services to your valid configurations across all quotes, estimates, and orders in Cisco Commerce (refer to the Getting Started with Cisco Commerce User Guide). You can also override these preferences at the quote, estimate, or order level.

If you ask Cisco Commerce to automatically add services to your order, they will be chosen based on the following:

- Services will be attached based on the service preferences set within the order
- If no services are set within the order, then preferences from your My Profile and Preferences will be used
- If selected preferences are not applicable (or not set), the system attaches services based on existing service attach rules, such as, products being ordered, service program availability, certifications, Bill-to and install site and others

To set the service options in the items sub-tab (these will override any preferences that were set under your My Profile and Preferences), complete the following steps:

1. From the Quote tab: Items sub-tab, expand the Set preference for this quote menu. Service preferences default from your My Profile and Preferences and you can change them for individual deals.



Quote Tab: Items Sub-Tab - Service Preferences

2. Click the appropriate radio button to allow Cisco to attach services automatically or to add services manually. See Adding Services to Individual Items.
3. Select the appropriate default services. It is not necessary to make selections under all four options.

Note: Duration is the only default attribute that cannot be chosen.

4.6.2 Adding Services to Items in the Configuration

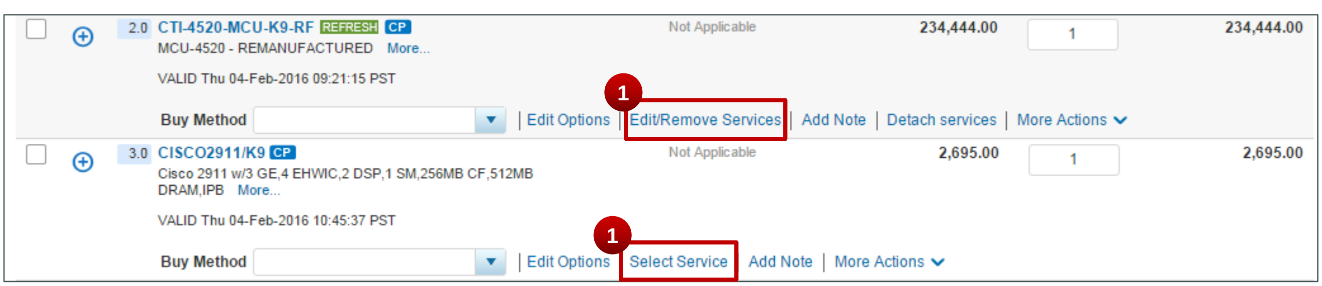
You can add services to individual items or attach services to multiple lines at the same time.

4.6.2.1 Adding Services to Individual Items

To add services to individual lines, complete the following steps:

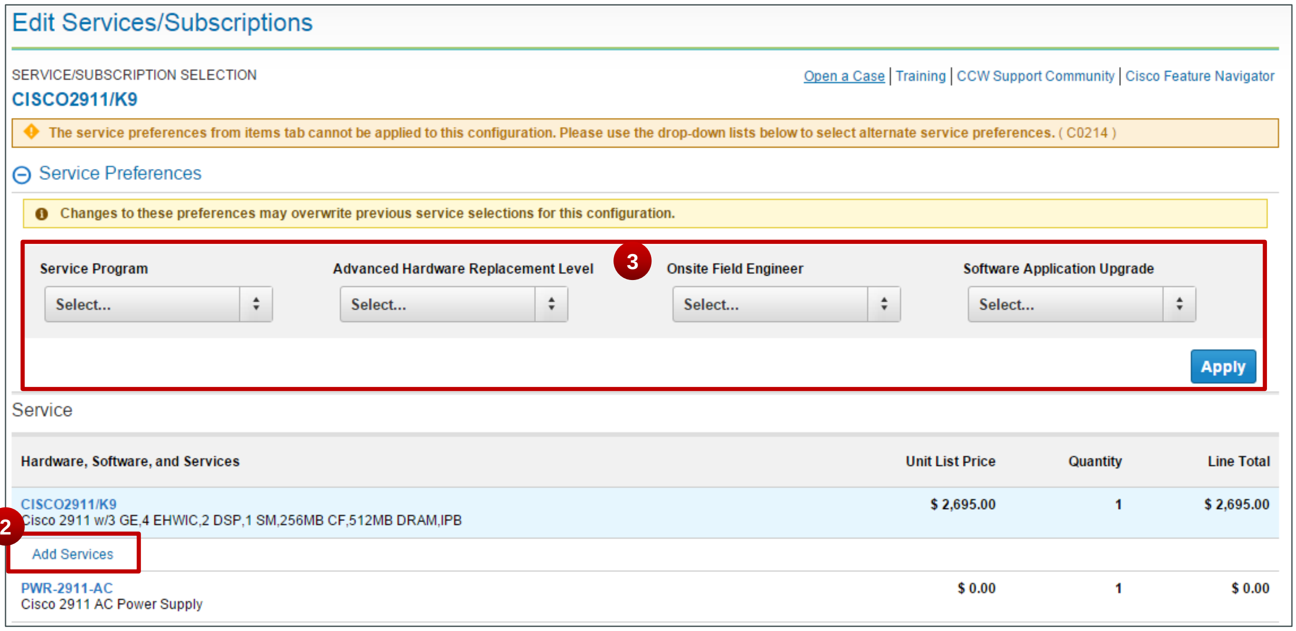
1. From the Quote tab: Items sub-tab, click Select Service if there is no service added yet on the line item, or Edit/Remove Services if there is already service and/or subscription on the line item.

   The Edit Services/Subscriptions page displays.



Quote Tab: Items Sub-Tab

2. From the Edit Services/Subscriptions page, click Add Services. If there were services already attached to this product, the link would read Edit Services. The Add Services page displays. Only the eligible services for the configuration on the deal are displayed.



Change Services/Subscriptions Page

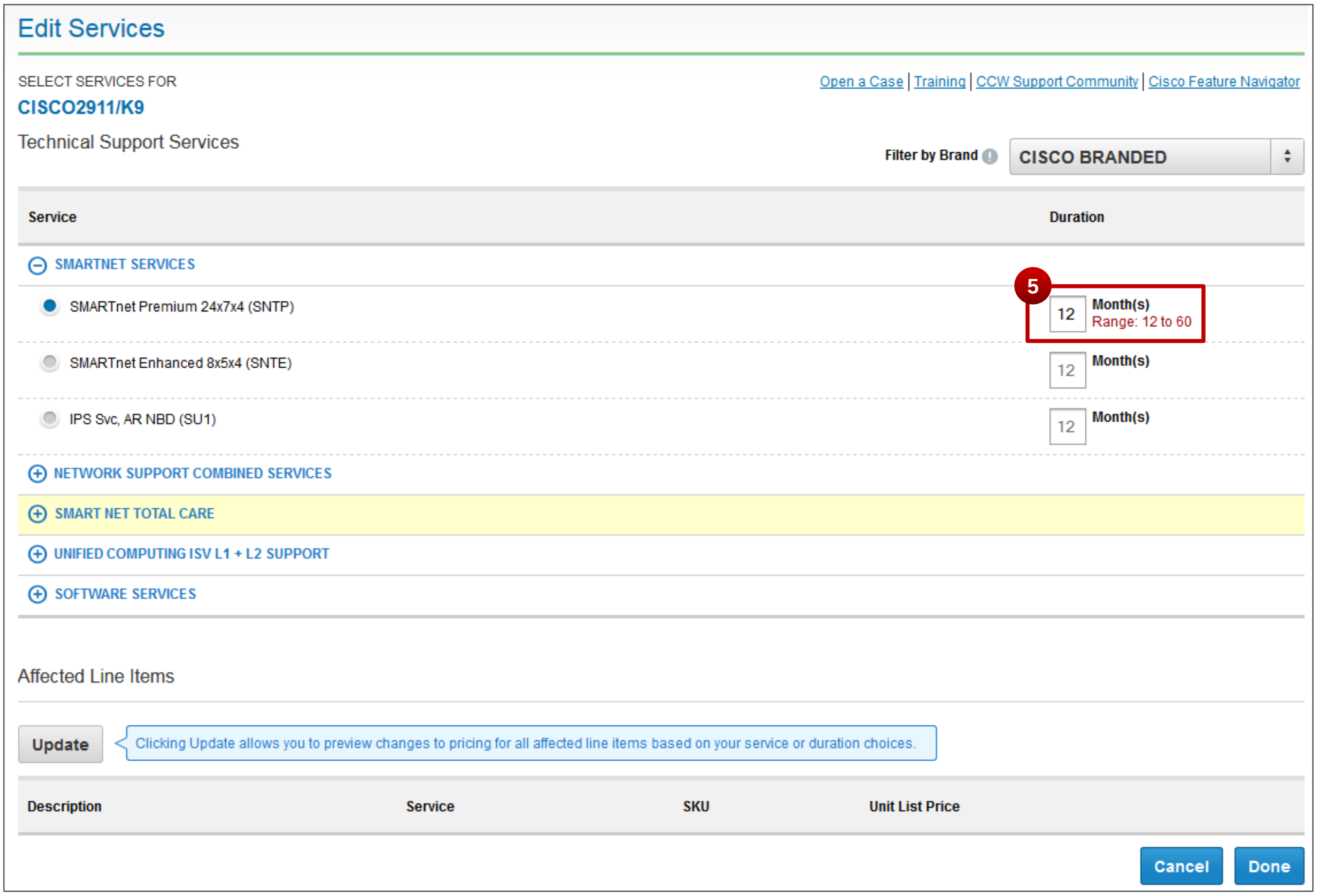
3. Besides clicking Add Services, it is also possible to add service by selecting the desired service selections from the four drop-down menus in the Service Preferences section and clicking **Apply**.

   Duration is the only attribute that cannot be chosen. See Setting Default Services Options.

4. On the Add or Edit Services page, click ⊕ to expand the Service Categories.
5. Click the appropriate service level radio button within one of the categories.

   Click the Duration field and enter any value within the minimum and maximum range listed below the Duration field. This minimum and maximum range is determined by the service chosen.

6. Click **Update** to preview pricing and the particular service level and SKU. The service line displays.
7. Repeat the steps as necessary.



Edit Services Page

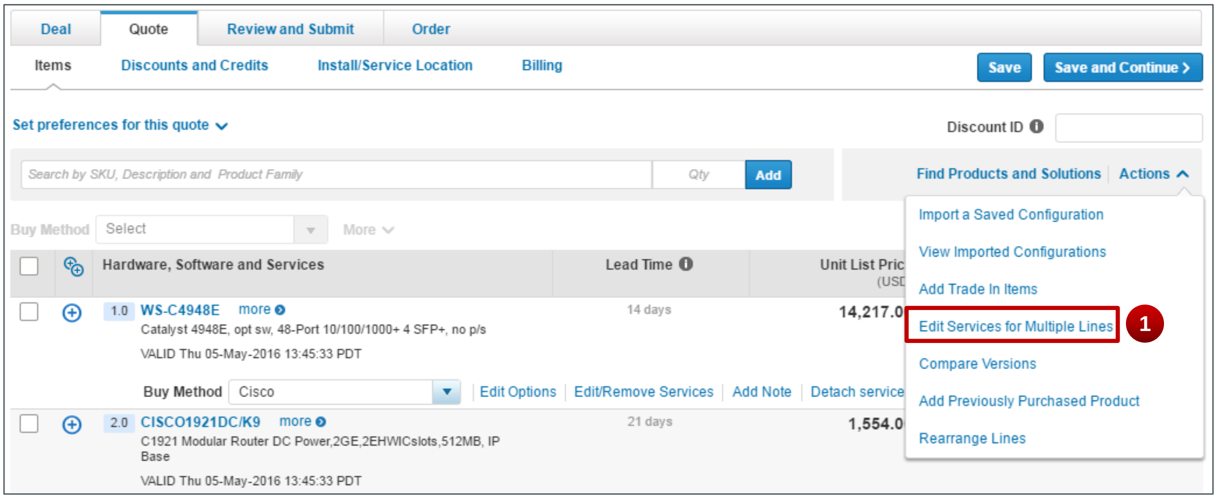
8. Click **Done** when finished. The Add or Edit Services page closes and the Edit Services/Subscriptions page displays. The change is briefly highlighted, and the Add Services link changes to Edit Services.
9. Click **Done** on the Edit Services/Subscriptions page when finished.
10. If applicable, click **Save**.

    Services can be changed or added to any or all items in the configuration in the same way.

4.6.2.2 Adding Services to Multiple Items

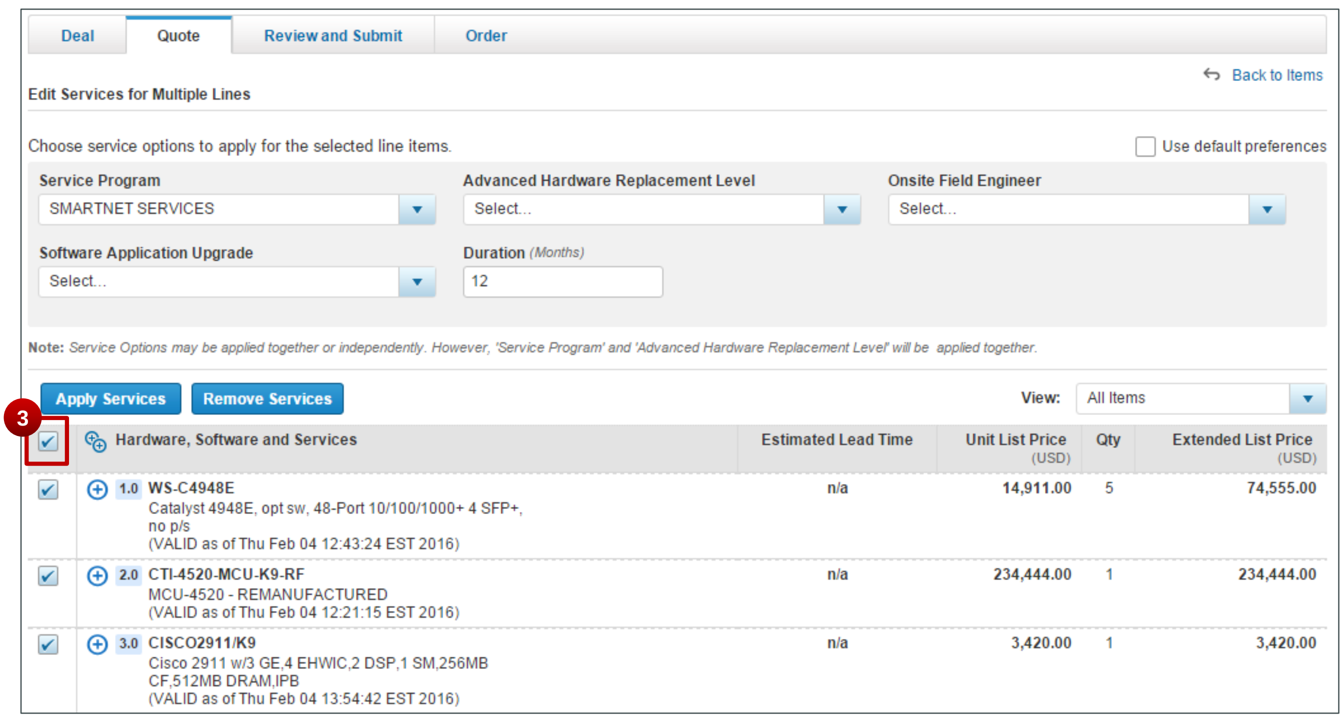
To cascade services to multiple lines in the configuration, complete the following steps:

1. From the Quote tab: Items sub-tab, expand the Action drop-down menu, and click Edit Services for Multiple Items. The Edit Services for Multiple Lines page displays on the Items tab.



Quote Tab: Items Sub-Tab

2. Check the appropriate checkboxes to indicate to which line items the services preferences should be applied.
3. Alternatively, check the checkbox in the header of the Items table to select all the lines.



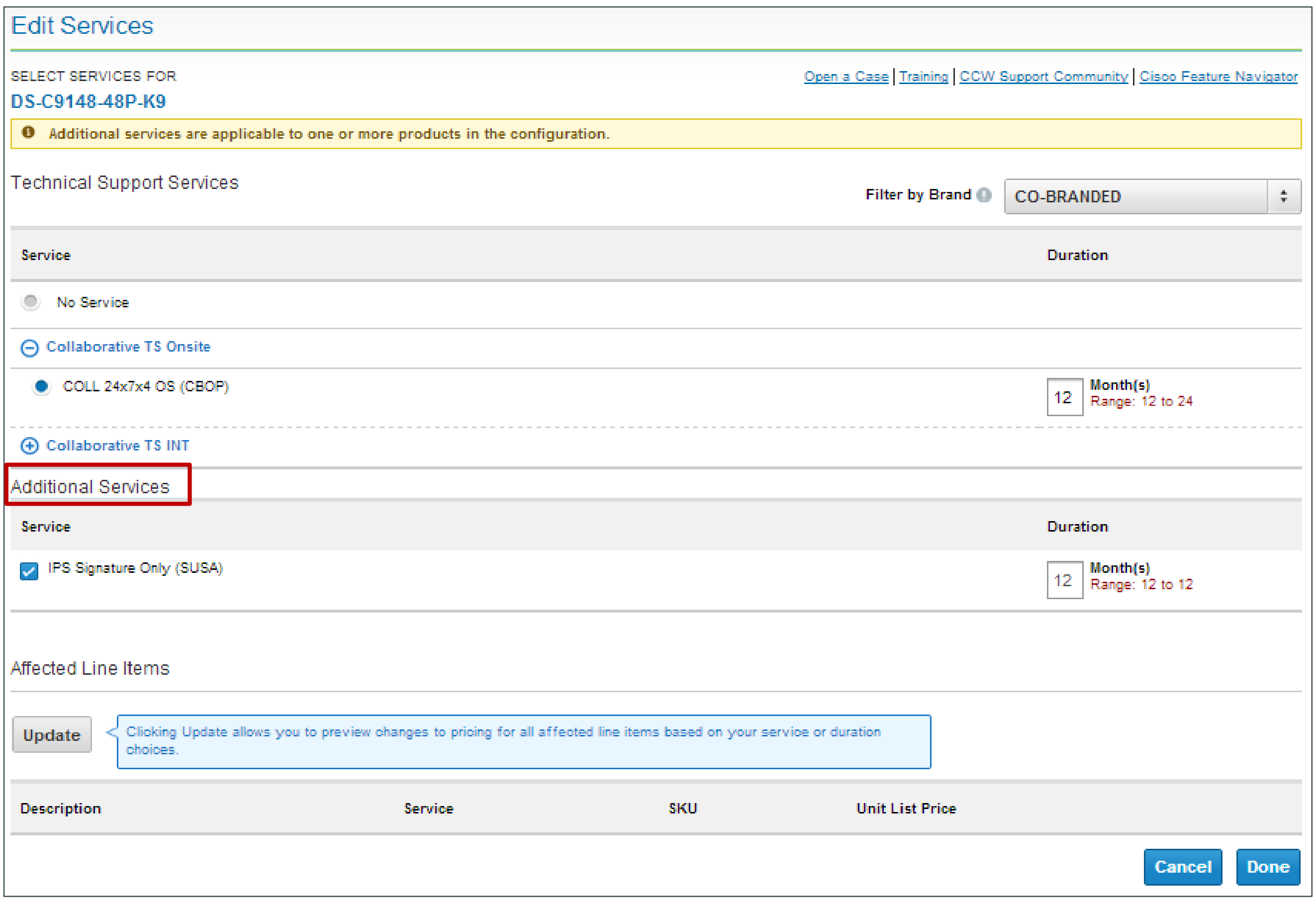
Quote Tab: Items Sub-Tab – Edit Services for Multiple Lines

4. Click the drop-down arrow(s) for Service Program, Advanced Hardware Replacement Level, Onsite Field Engineer, and Software Application Upgrade and select the appropriate option(s). Enter the appropriate duration.

5. Click **Apply Services**. A success message displays.
6. To remove services for all or selective items, check the appropriate checkbox(es) and click **Remove Services from Selected**.
7. Click Back to Items.

4.6.2.3 Attaching Additional Services

You can attach additional services (also known as secondary services) to line items similar to Adding Services to Individual Items.



Edit Services Page: Additional Services View

The additional service duration can be different from the primary service, as long as the additional service duration is within the timeframe of the primary service. If the option to automatically attach services to the order is enabled, and additional services are available for the primary service attached, one additional service is automatically attached as well.

When cascading services using Edit Services to Multiple Items, the system will add the selected primary service and automatically add one additional service that is mapped to the primary. A message will display, indicating that the additional services have been added. You can remove the additional services for all selected configurations, if needed.

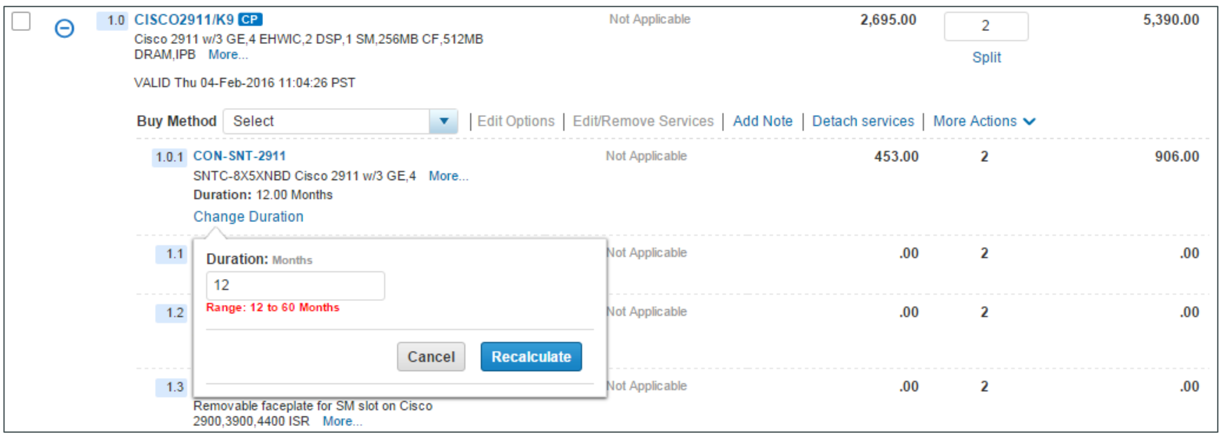
Additional services can also be imported if saved as a configuration using Import a Saved Configuration (see Importing an Estimate or a Configuration).

4.6.2.4 Changing Service Duration on the Items Sub-Tab

You can change service duration from the items sub-tab of the newly added services. To do so, complete the following steps:

1. Click (⊕) to expand the major line.
2. Click Change Duration. The Duration section expands.
3. Type the desired duration (within the service duration parameters) and click **Recalculate**.

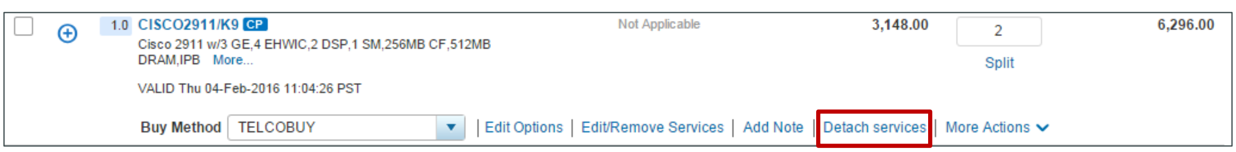
   The service duration gets updated with refreshed pricing.



Quote Tab: Items Sub-Tab – Service Duration

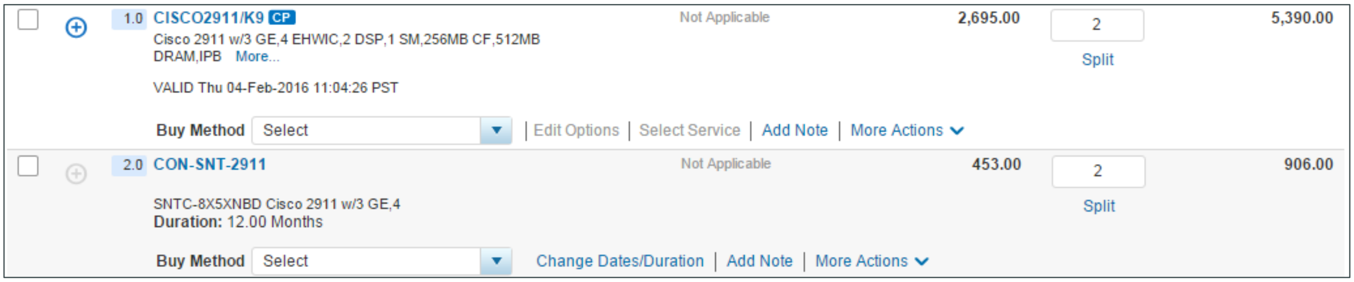
4.6.3 Detaching Services

You can detach non-mandatory services attached to an item in a quote and add them as standalone services. This will allow you to quote products and services with different buy methods.



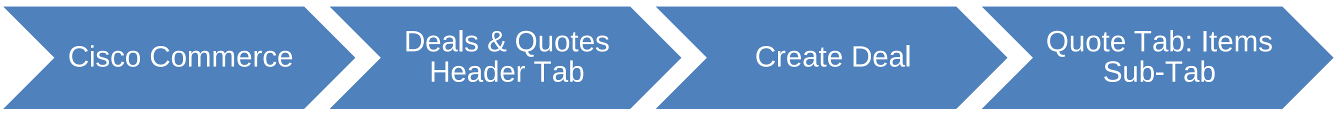
Quote Tab: Items Sub-Tab – Detach services

Click Detach Service to detach non-mandatory services from an item. Alternatively, select multiple items and click Detach services to detach non-mandatory services from multiple items in the items sub-tab. The items sub-tab refreshes to display the services as a major line item.



Quote Tab: Items Sub-Tab –Refreshed

4.7 Renewing Software Subscriptions



You can renew existing subscription contracts and create new subscription contracts using Cisco Commerce, either directly through the Subscriptions tab or from within an order.

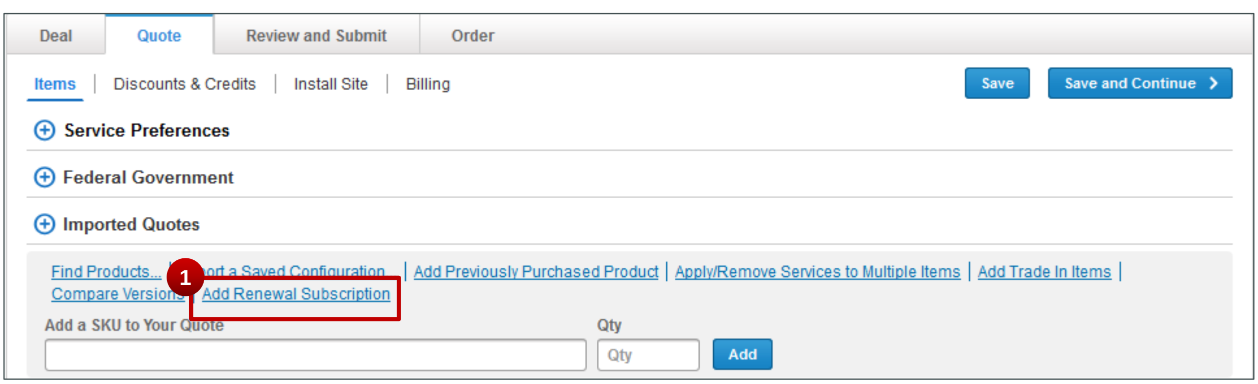
Note: This capability is limited in Cisco Commerce and has only been enabled for limited offers. Use CSCC to manage subscription offers that have not been enabled.

Note: When adding a subscription renewal to an existing contract, you can co-term the end dates of the software subscription renewal to an existing contract in Cisco Commerce Order (see the Cisco Commerce Order User Guide for details). However, this feature is available for 1-tier partners only.

Best Practices: Do not renew the same subscription through both Cisco Commerce and CSCC.

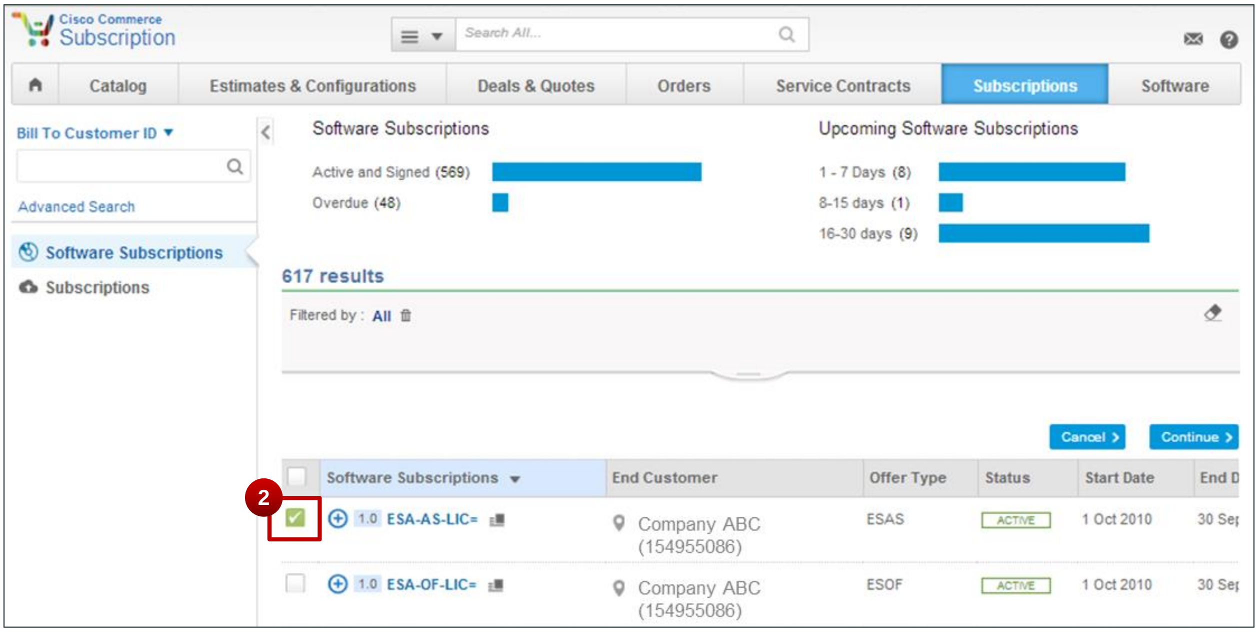
To renew a software subscription, complete the following steps:

1. Click Add Renewal Subscription to add software subscription renewals to the deal. The Subscription page displays in a new window.



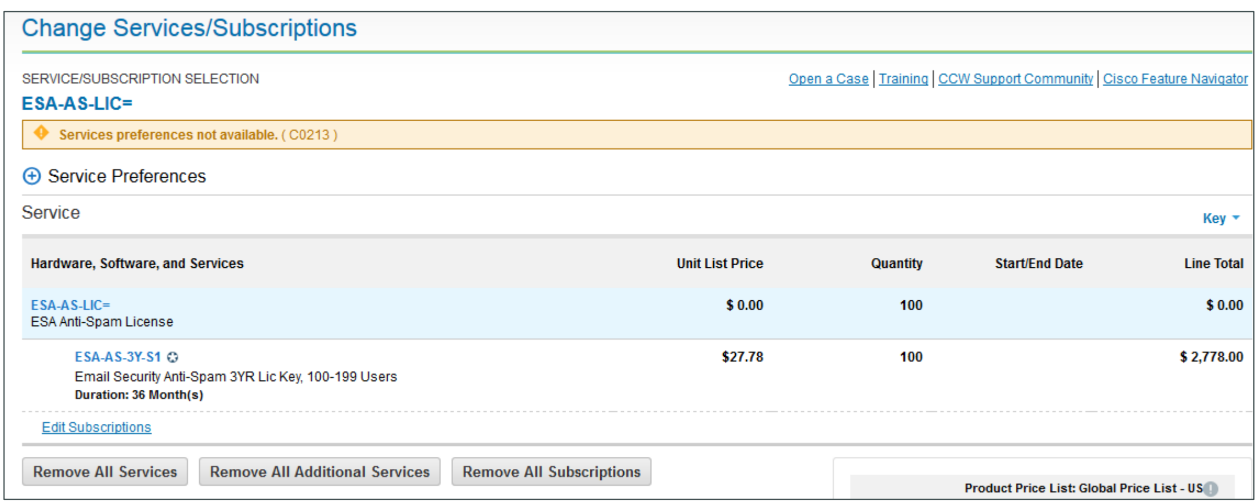
Quote Tab: Items Sub-Tab

2. Select the subscriptions to add.



Subscriptions Page

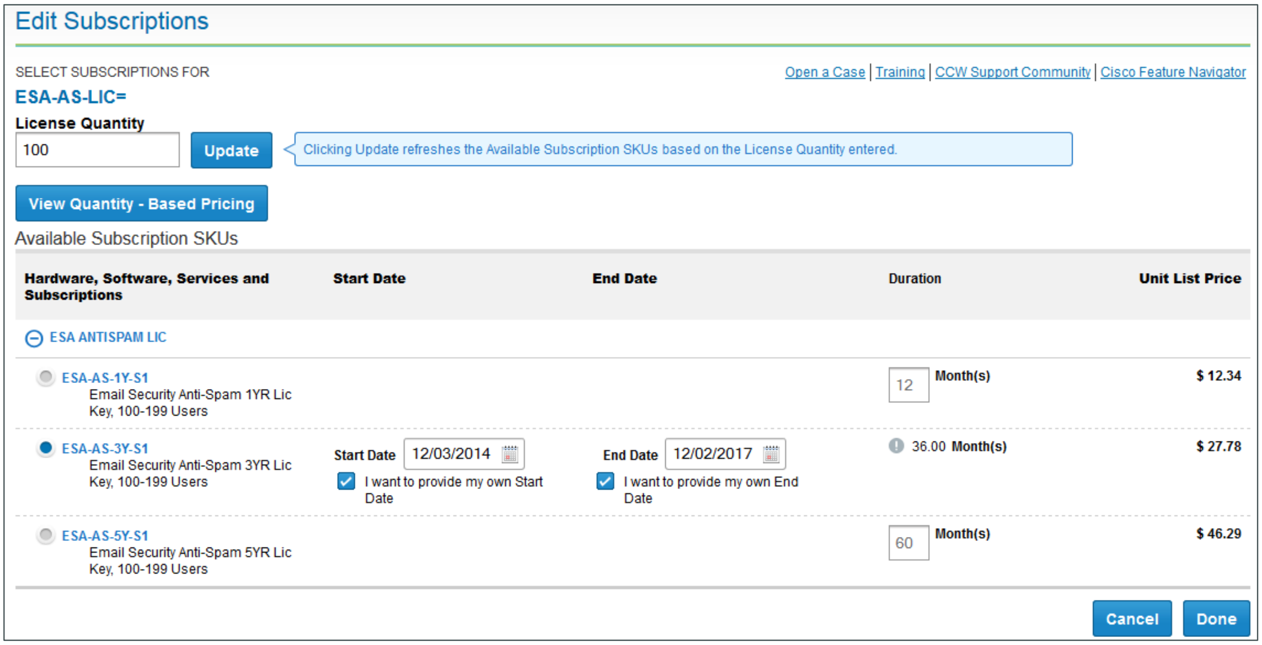
3. Click **Continue** to return to the Items sub-tab.
4. Click the (⊕) icon next to the item to view the subscription license quantity, duration, start date, and end date.
5. Click Change Services/Subscriptions. The Change Services/Subscriptions page displays.



Change Services/Subscriptions Page

6. Click Edit Subscriptions. The Edit Subscriptions page displays.
7. Select the SKU that corresponds to the desired renewal duration.

8. Enter the Start Date and End Date. You can select a different end date. The new duration will auto-populate.

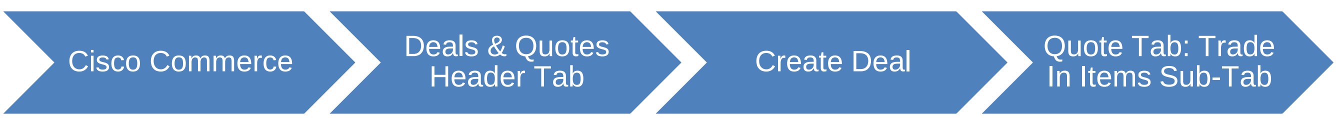


Edit Subscriptions Page

9. Enter the license quantity for the subscription. Click **Update**.

10. Click **Done**. Follow the appropriate steps in Adding Services to return to the Items sub-tab.

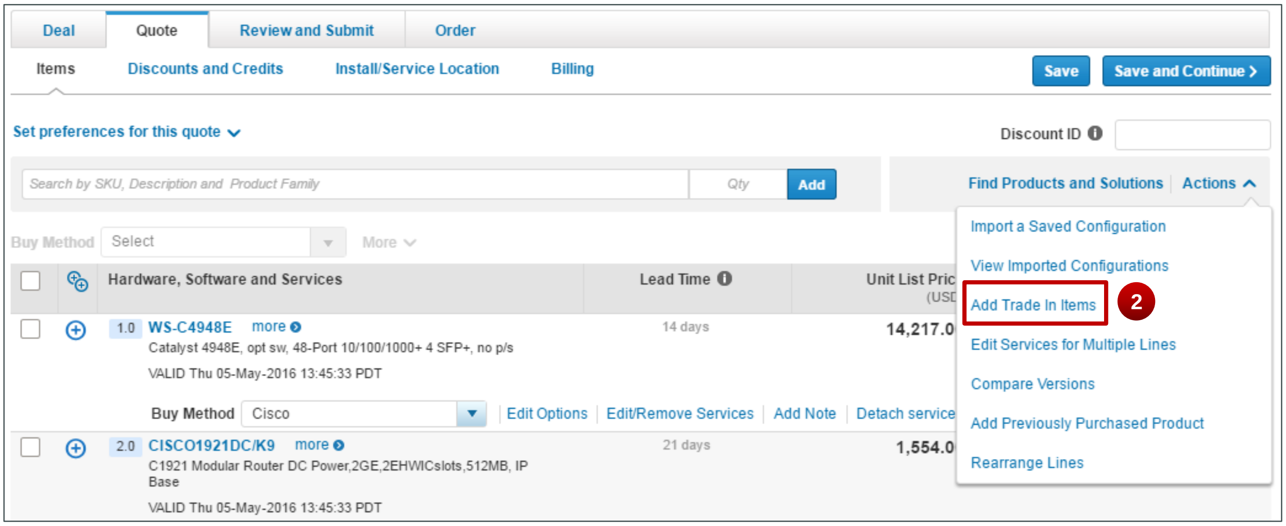
4.8 Adding Trade-in Items



You can enroll in the Technology Migration Program (TMP) to use the trade-in functionality in Cisco Commerce. Once TMP is added to a deal, no other orders can be placed on that deal.

You cannot create multiple orders from a single trade-in deal. You have to create a new trade-in deal for each order.

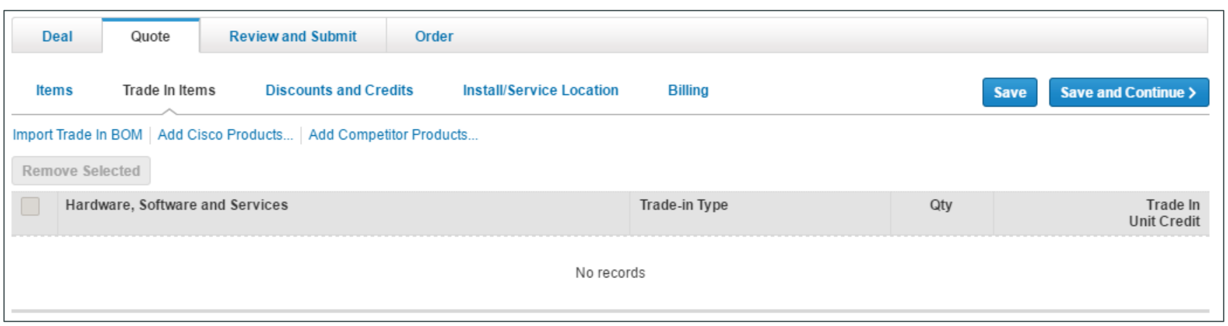
Note: The deal must contain only one buy method. To have different buy methods, create a new trade-in deal for each item.



Quote Tab: Items Sub-Tab

To request a trade-in credit for an end customer, complete the following steps:

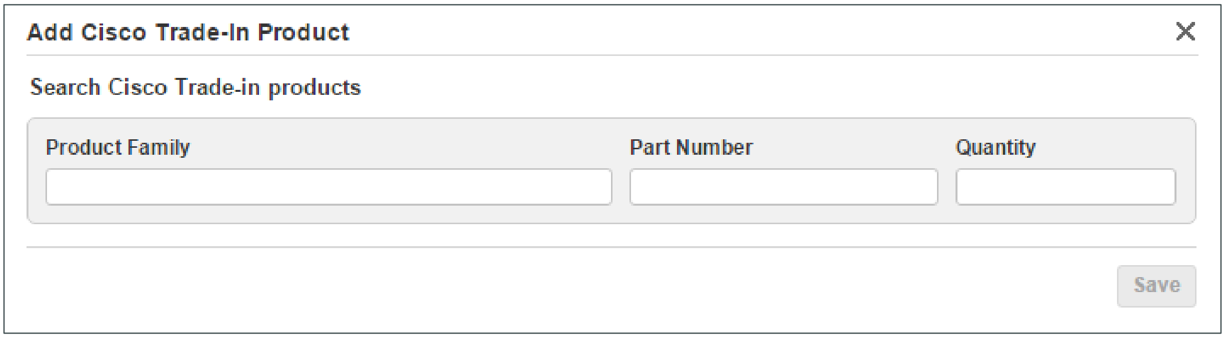
1. Ensure the buy method is indicated prior to adding trade-in items.
2. Click Add Trade In Items. The trade-in credit will be approved after receipt of the trade-in item(s). The Quote tab: Trade In Items sub-tab displays.



Quote Tab: Trade In Items Sub-Tab

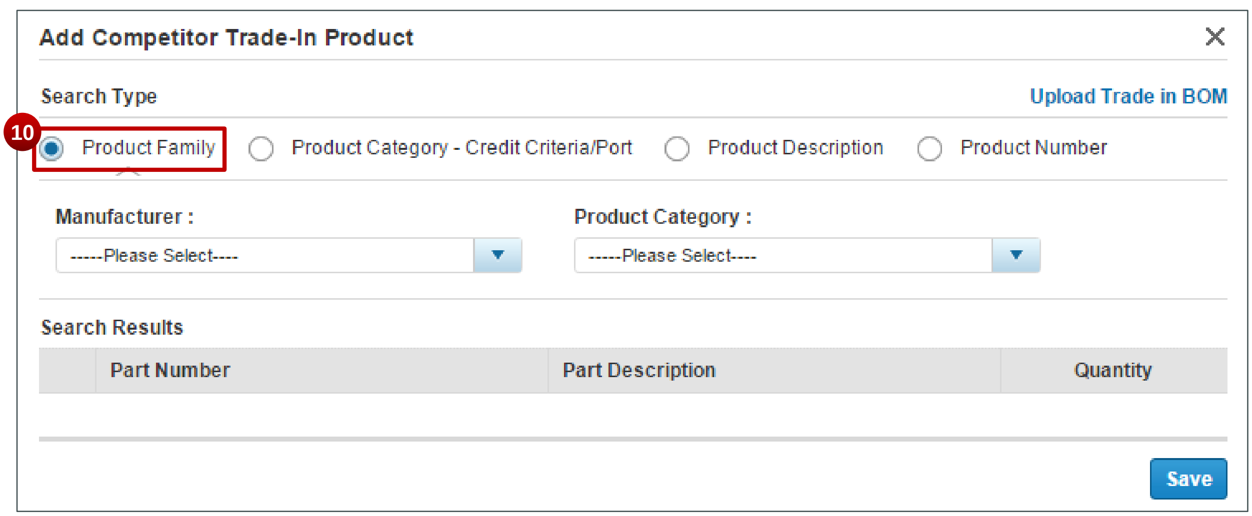
You can use any of the three methods to add trade in items.

3. To import a trade-in BOM, click Import Trade in BOM. Upload the file with the trade-in items.
4. Alternatively, to add Cisco products to the Trade In Items Sub-tab, click Add Cisco Products. The Add Cisco Trade-In Products dialog box displays.



Add Cisco Trade-In Product Dialog Box

5. Click the Product Family or Part Number field and enter the appropriate information. Matching items display in the drop-down menu.
6. Click the appropriate option.
7. Click the Quantity field and enter the quantity.
8. Click **Save**. The dialog box closes. The Quote tab: Trade In Items sub-tab displays the message that the trade-in item was added successfully to the quote.
9. Alternatively, to add Competitor Products to the Trade In Items Sub-tab, click Add Competitor Products on the Quote tab: Trade In Items sub-tab. The Add Competitor Trade-In Product dialog box displays.



Add Competitor Trade-In Product Dialog Box

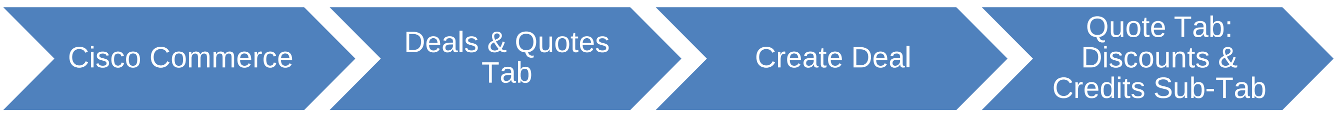
10. Click the appropriate radio button. Depending on which search type is chosen, either drop-down options display or a Search field displays.
11. Click the drop-down arrows and make the appropriate selections or click the Search field and enter the appropriate information. The Search results display.
12. Click the appropriate radio button.

13. Click the Quantity field and enter the quantity.
14. Click **Save**.
15. After the trade-in information is complete, click **Save**.

Once all products and services have been added, click **Save and Continue**. The Quote tab: Discounts & Credits sub-tab displays.

Note: If a quote contains standard trade-in credits, they will require non-standard approval.

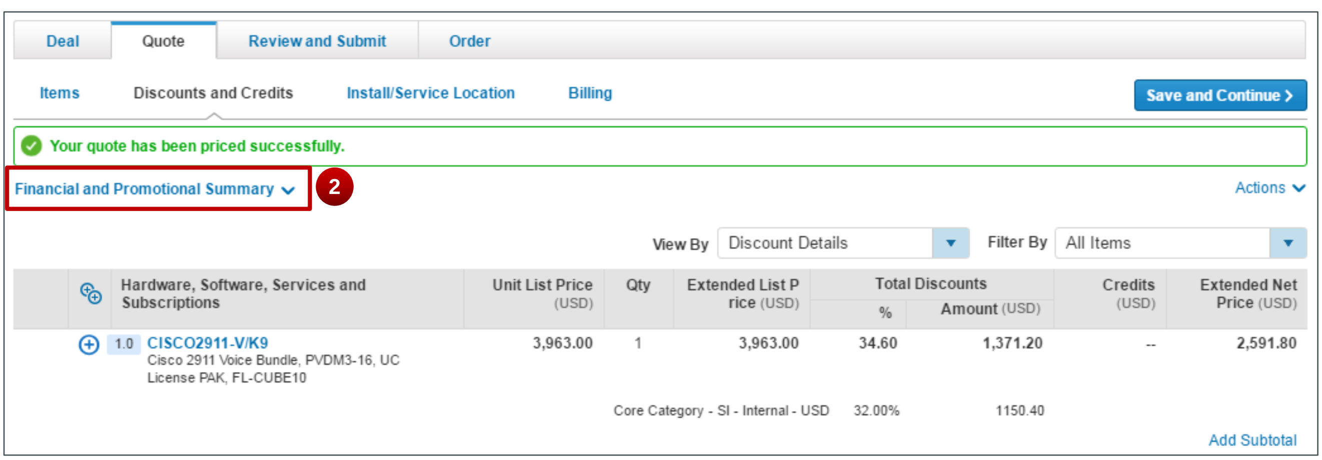
4.9 Reviewing Discounts and Credits



In the Quote tab: Discounts & Credits sub-tab, you can view detailed information about the discounts applied.

1. You can view:
   - Unit List Price and the Extended List Price
   - Base discounts and stackable discounts as per the various incentives (programs and promotions) selected displays under the Total Discounts
   - Extended Net Price on the far right

     When the major lines are collapsed, the discount column displays a blended discount. Expand a major line to view each individual line's discount.



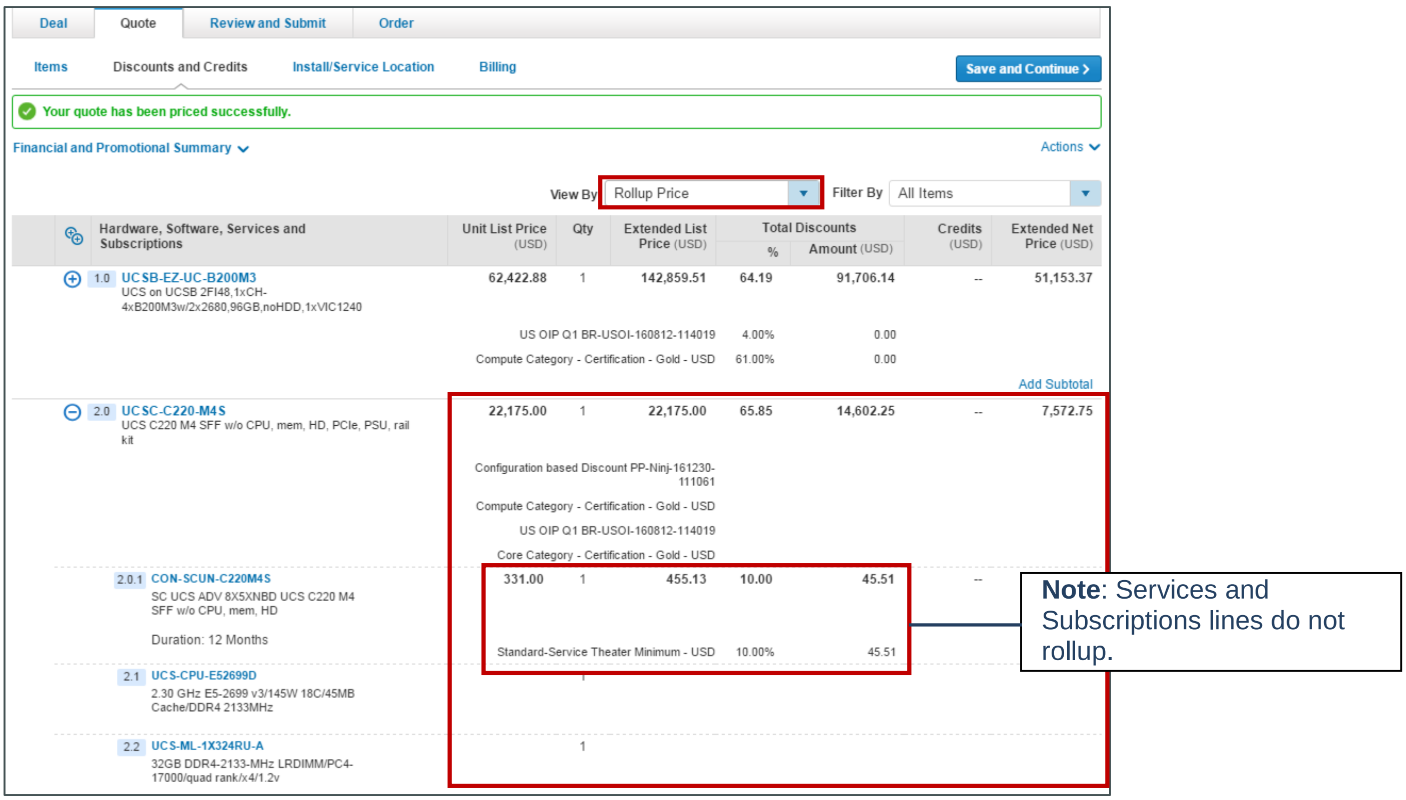
Quote Tab: Discounts & Credits Sub-Tab

2. Click to expand the Financial and Promotional Summary section to view promotion details. In the expanded view, promotions details are displayed along with Promotion End Date, excluding the grace period.

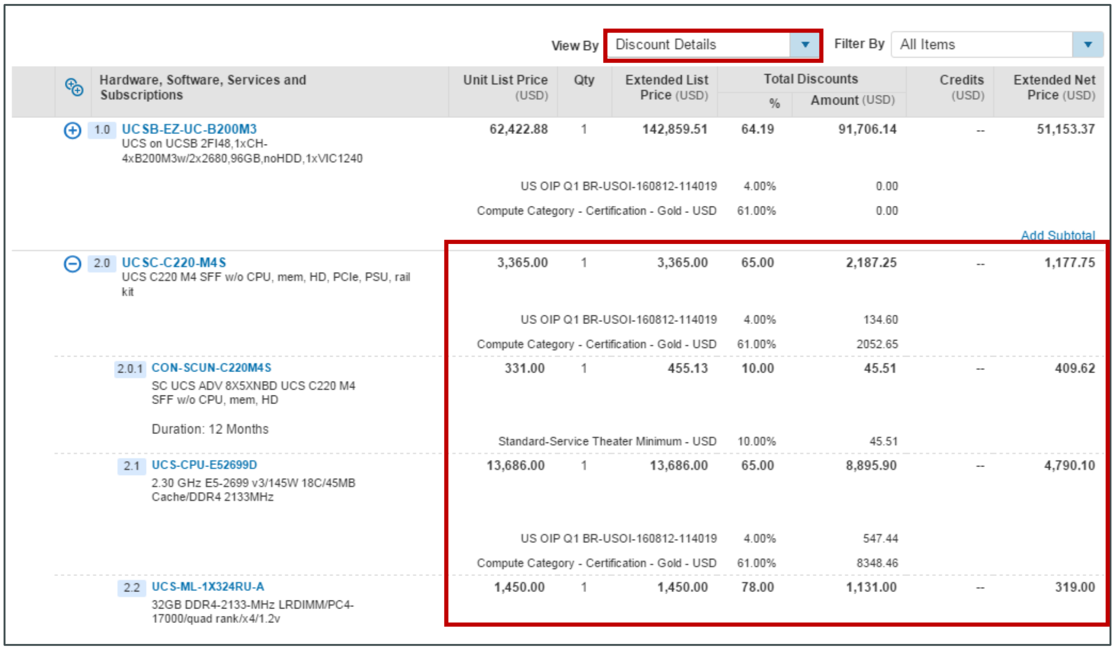
Best Practice: Review the List Price Catalog to see the base discount percentages, category, and end of sale date. See [Getting Started with Cisco Commerce User Guide](#).

4.9.1 Rollup Price View

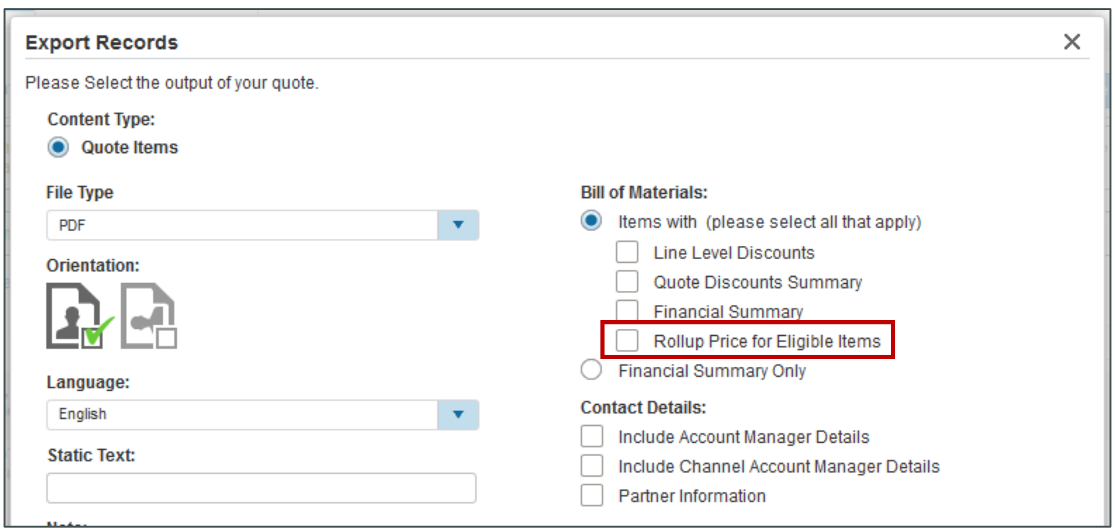
When creating a deal or a quote, a Rollup Price view is available for eligible product families (e.g. UCS) in Expanded Mode on the Discounts & Credits tab. Product prices (Major/Minor lines) will be rolled up to top line. Services and Subscriptions do not rollup to the top line.



The default view is Rollup Price view. You can switch between Rollup Price view and Discount Details view or any other view options.



You can export, print and email the quote pricing in PDF/XLS format with Rollup Price view:

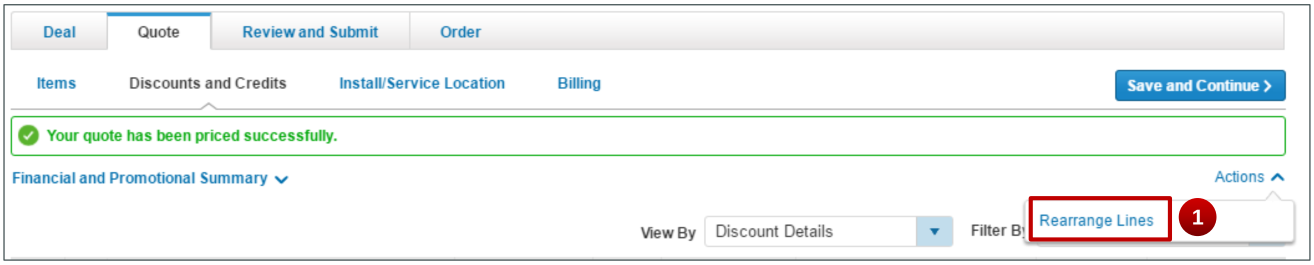


4.9.2 Formatting a Quote

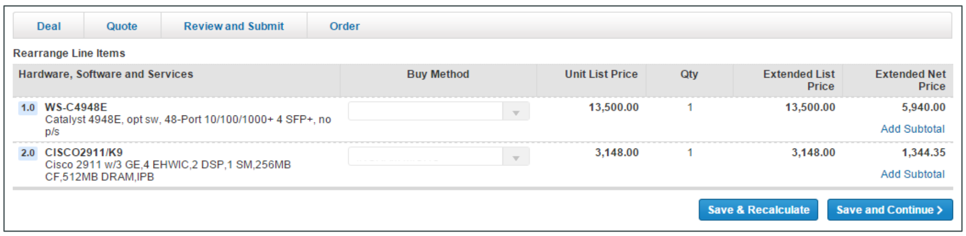
Use the option Rearrange Lines to rearrange the quote lines.

To format a quote, complete the following steps:

1. From the Discounts & Credits sub-tab, expand the Actions drop-down menu and click Rearrange Lines. The Deals and Quotes page refreshes in an edit mode.



Quote Tab: Discounts & Credits Sub-Tab - Format Quote Link



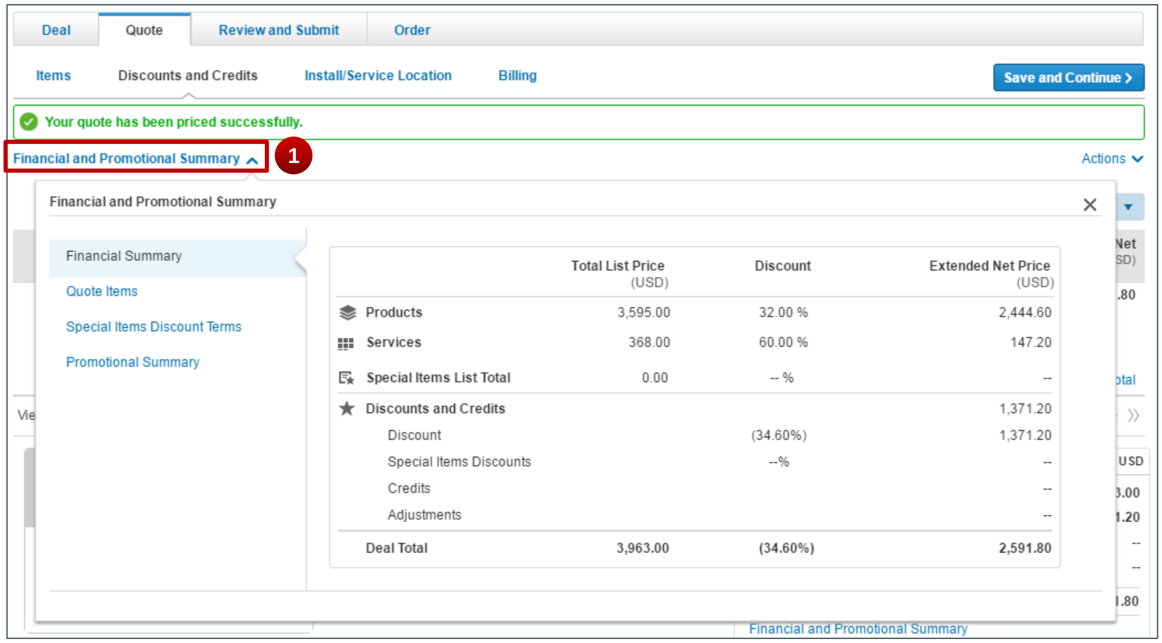
Deals and Quotes Page

2. Click to drag and rearrange lines.
3. Click **Save and Continue**. Quote tab: Discounts & Credits sub-tab displays.

4.9.3 Viewing Financial Details

To view financial details, complete the following steps:

1. From the Discounts & Credits sub-tab, click to expand the Financial and Promotional Summary section. The Financial and Promotional Summary dialog box displays.



Quote Tab: Discounts & Credits Sub-Tab

4.9.4 Using Financing Options (For US and Canada only)

If you are a partner or a reseller in US or Canada, you can embed financing options during the quote/deal creation process in Cisco Commerce.

- You are systematically provided with a default lease quote that can be viewed on the Review tab of the quote/deal after the deal is approved. See Modifying and Re-Generating a Lease Quote.
- If you are working with resellers, then you will have the option of generating a lease quote from the Review tab. To generate a leasing quote, you will need to provide information on the end user.

Note: Deals with Reusable Non-standard Discounts (RNSDs), Global Deals and SaaS Deals will be exempt from lease quotes.

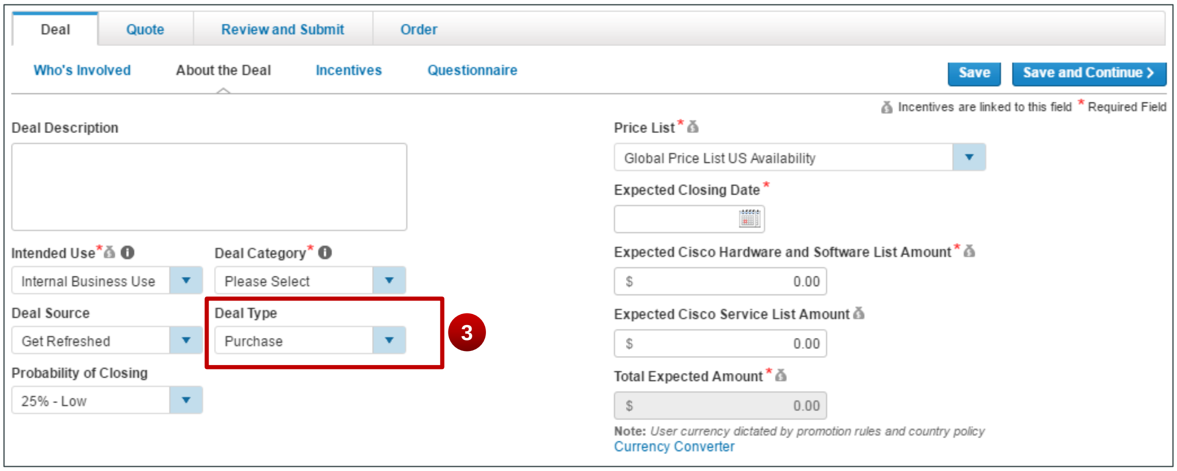
4.9.4.1 Modifying and Re-Generating a Lease Quote

Complete the following steps to re-generate a lease quote:

1. Create and submit a deal or quote for approval. Refer to Creating a Deal and Creating a Quote for more information on creating a deal or a quote.
2. Complete all required information on the Who's Involved tab. Select Cisco as the buy method and ensure that only standard discounts are applied.

   If creating a quote, skip to step 6.

   If creating a deal, continue on to step 3.
3. If creating a deal, rather than a quote, on the About the Deal tab, ensure to click the Deal Type drop-down arrow and select Lease. In addition, enter any other required information.



About the Deal Tab: Deal Type - Lease

4. If creating a deal rather than a quote, navigate to the Incentives sub-tab and select the correct incentive (program or promotion) if applicable. Answer any questions related to the promotion and save the deal.
5. If creating a deal where the selected incentive requires qualification approval, submit the incentive for qualification.
6. If creating a deal, once the incentive is successfully qualified, a notification e-mail is sent. Re-open the deal and navigate to the Quote tab: Items sub-tab to begin building the quote. See Building a Deal. If creating a quote only, add items to the quote from the Items sub-tab.
7. The quote is priced with any discounts you are entitled to receive.
8. On the Quote tab: Billing sub-tab, select the Cisco Capital bill-to address and contact.
9. Submit the completed quote for approval by clicking **Submit Quote for Approval**.

4.9.4.2 Partner Financing Options

Once the quote is approved, open the quote again. On approved quotes, Cisco Commerce will invoke the Cisco Capital pricing service to generate the default lease quote and display the lease Quote Summary at header level on the Review tab.

The financing amount is displayed. The financing amount is the same dollar amount as the Quote Total in the Quote Summary section. The Financing Amount may change if the partner has indicated an end customer discount off list price in the preferences.

The system generates a default lease quote based on the following attributes:

- The net end customer discount off the Cisco list price for hardware, software, and services, made up of:
  - The customer hardware and software net price (product net from sales quote)
  - And the customer service net price (service net from sales quote)
- The financial product's fair market value (FMV), lease term, payment type, and billing frequency

Click Calculate Financing Options in the Financing Amount section. The Lease Payments Calculator dialog box displays.

4.9.4.3 Partner Lease Payment Calculator

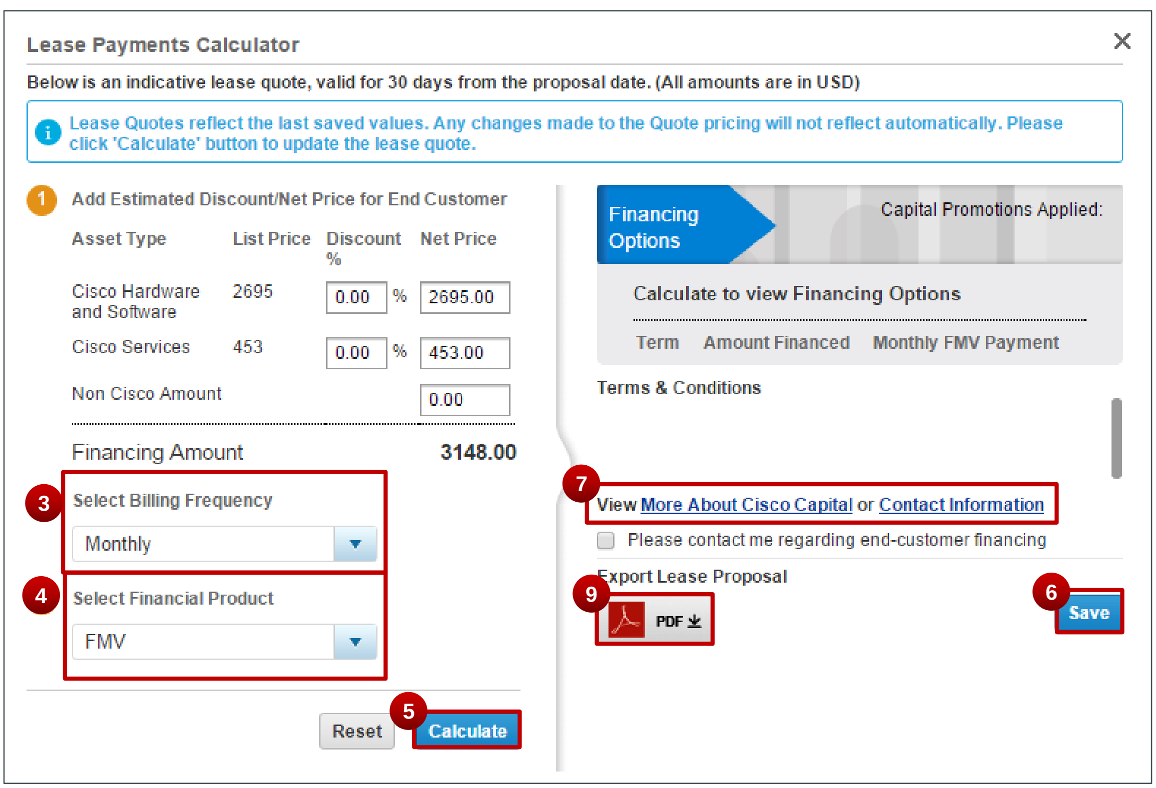
On the Lease Payments Calculator dialog box, you can modify fields on the lease quote to have it re-generated. If the new quote information is saved, the updated lease quote information will be displayed on the Review tab. To change the leasing options, complete the following steps:

A message displays in the Lease Payments Calculator dialog box that it is an indicative, or temporary, lease quote.

1. Update the end customer discount in the Discount % field under the Discount column in either the Cisco Hardware and Software or Cisco Services fields. A new net price will be re-calculated.
2. Alternatively, click in a Net Price field and enter a net price. The corresponding discount % will be calculated.

   It is also possible to click in the Non Cisco Amount field and enter or change the non-Cisco dollar amount.

Note: For a default lease quote, the system always defaults the Non Cisco Amount as zero. If you are interested in getting some non-Cisco products to be financed by Cisco Capital, you can enter the amount while regenerating the lease quote.



Lease Payments Calculator Dialog Box

The customer discount off list price is same as partner's standard discount % from the sales quote.

3. Billing frequency defaults to Monthly. Click the Select Billing Frequency drop-down arrow and select the desired option.
4. The financial product is defaulted to fair market value (FMV). Click the Select Financial Product drop-down arrow and select FMV to indicate fair market value at the end of term.

   Alternatively, select $1 Buy Out to indicate the purchase of the product for $1 at the end of the term.
5. Click **Calculate** to re-generate the lease quote and to re-calculate the budgetary leasing options on the quote. This invokes the Capital Pricing Service and financing payment options will be re-generated on the lease quote and displayed to you.
6. Click the radio button corresponding to the desired payment period or term. The billing period (also known as the lease term) default is 36 months.

   You do not need to click **Calculate** to change only the lease term, simply click **Save**. If you want to change the End Customer Net Price, Billing Frequency, Non-Cisco amount, or select $1BUYOUT, click **Calculate**.
7. To optimize the use of Cisco financing options, click View More About Cisco Capital or Contact Information links.
8. If desired, check the Please contact me regarding end customer financing checkbox to request to be contacted by a Capital Channel Account Manager or Leasing Manager.

Note: Cisco Commerce displays Capital Terms and Conditions when displaying the indicative financing quote

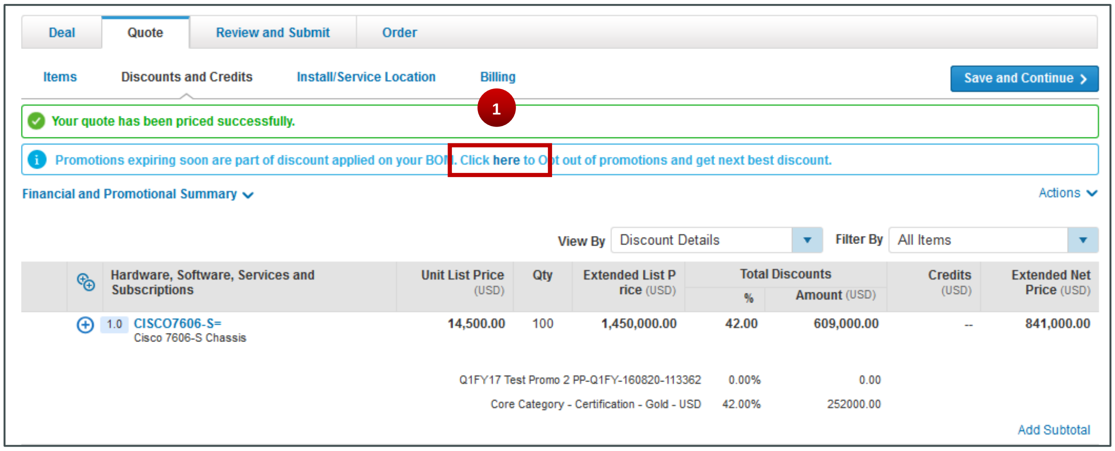
9. If desired, click **PDF** to export the lease proposal to save a local copy.
10. Click **Save**. The financing options are saved in the system and the Review tab displays.
11. Once the financing quote is saved, an e-mail with the deal info is sent to you. The e-mail contains information that is pertinent to the sales quote and financing quote.

If you re-open an approved quote, the lease quote will be re-generated upon re-approval of the sales quote.

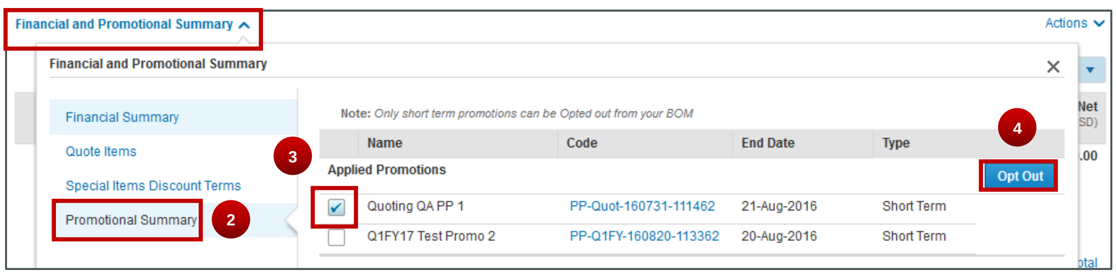
4.9.5 Opt Out of Push Promotions

During deal registration, you can opt out of available push incentives via a link on the Discounts and Credits tab.

1. Click 'here' to view Promotional Summary, which lists promotions that are applied or opted out.

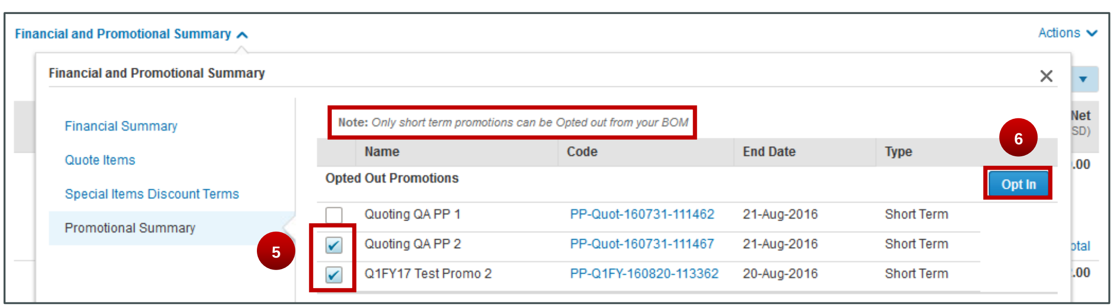


2. Alternatively, Click Promotional Summary under the Financial and Promotional Summary menu to view applied Promotions.
3. Check the box(es) of the applied promotions you would like to opt out from your BOM.
4. Click Opt Out.



If you would like to opt in to a promotion you have previously opted out:

5. Check the box(es) of the promotion you want to opt in.
6. Click Opt In.



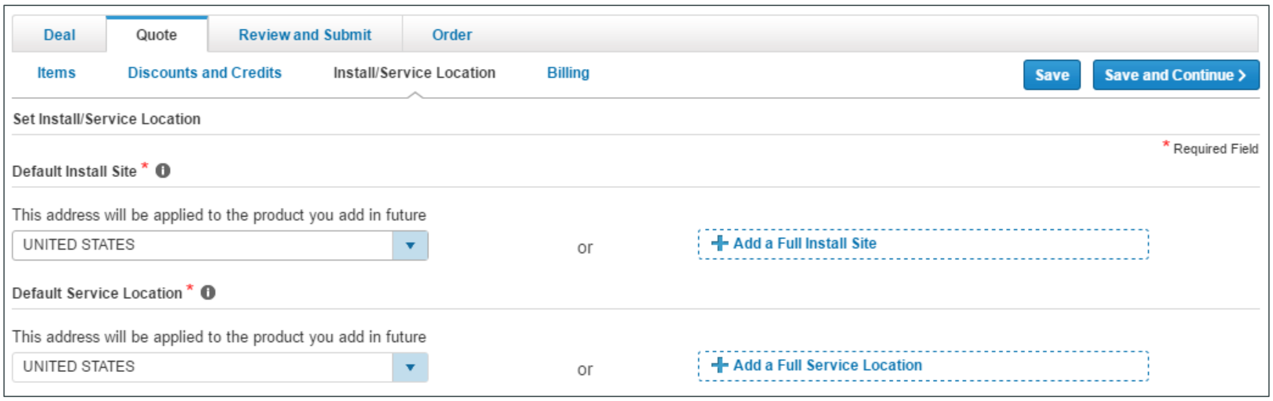
Only short term promotions can be opted out from your BOM.

4.10 Reviewing or Editing the Install Site Information

Cisco Commerce > Deals & Quotes Tab > Create Deal > Quote Tab: Install Site Sub-Tab

From the Install Site sub-tab, you can review the install site information, set defaults, and edit it for individual or multiple items.

From the Quote tab, click Install Site. The Quote tab: Install Site sub-tab displays. The install site established when creating the deal is the default site for the entire quote. Individual line items can be installed at different locations. The original install site remains the default for any new items added.



Quote Tab: Install Site Sub-Tab

The price list for services is determined by the install site country.

Best Practice: When there are multiple install site countries for a quote, set the install site country at the line level rather than at the quote level. See Setting Separate Install Sites for Individual Line Items or Changing Install Site for Multiple Lines.

Note: If the buy method is a distributor and the distributor BID and the install site ID of a quote line belong to different country pricelists, Multi-National Quoting (MNQ) discounts are applicable for the country pricelist of the install site country.

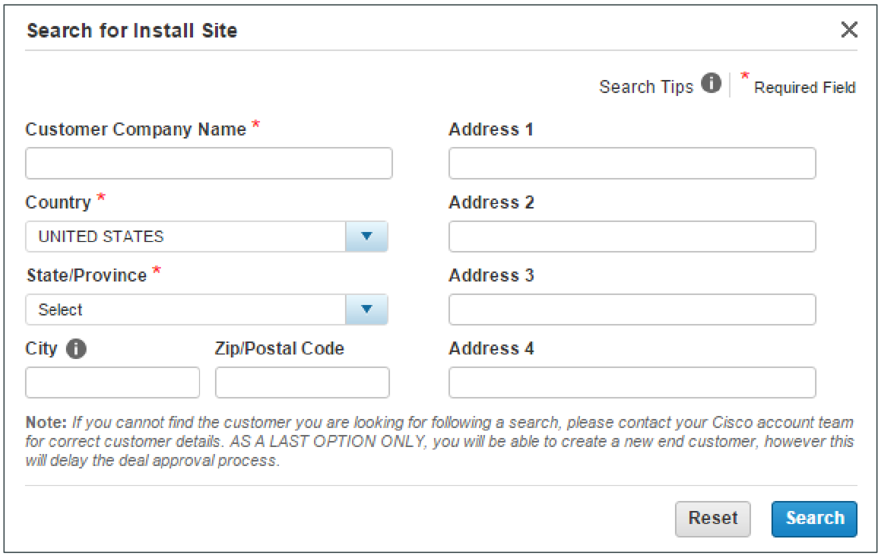
The MNQ discount is applied systematically when the pricing is evoked on the quote so there is no manual process needed.

4.10.1 Setting the Default Install Site for the Entire Quote

Under Default Install Site section on the Quote tab: Install Site sub-tab, complete the following steps:

1. To set the original install site as the install site for the entire quote, click the **Apply Default to All Items** button.
2. The Install Site Country is populated automatically. If applicable, click the Country drop-down arrow and click the appropriate option to change the install site country.

3. If applicable, click Add a Full Install Site. The Search for Install Site dialog box displays. See Populating the End Customer Section; the functionality for adding a full install site and creating a new customer address are similar.



Search for Install Site Dialog Box

Note: Create a new address only after verifying that the address does not already exist in the database.

4.10.2 Setting Separate Install Sites for Individual Line Items

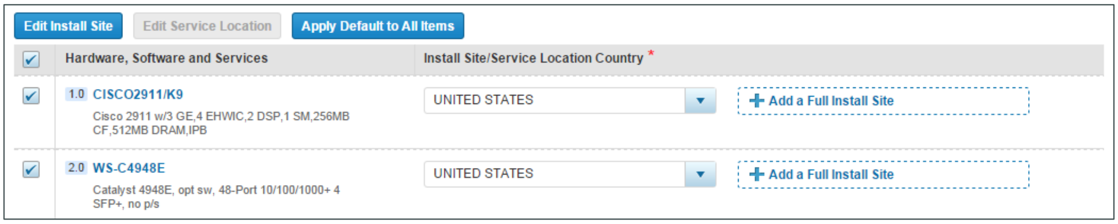
If separate install sites are to be used, complete the following steps:

1. Scroll down to the Items section.
2. Next to the line item that will have a different install site, click Add a Full Install Site. The Search for Install Site dialog box displays. See The Search for Install Site dialog box displays. See Populating the End Customer Section; the functionality for adding a full install site and creating a new customer address are similar.

4.10.3 Changing Install Site for Multiple Lines

To change the install site for multiple items at the same time, complete the following steps:

1. Scroll down to the Items section.



Edit Install Site for Multiple Lines

2. Check the appropriate checkboxes for the line items that should be installed at an address other than the default address.
3. Click **Edit Install Site**. The Choose/Edit Install Site for Multiple Lines dialog box displays.
4. Click the Yes radio button to specify only the install site country.

Choose/Edit Install Site for Multiple Lines Dialog Box

5. Click the Country drop-down arrow and click the appropriate option.
6. Click **Apply**. The dialog box closes and the install site information is updated.

4.10.4 Changing the Service Location Country

Specify the Service Location if you are transacting SaaS Subscriptions. By default, the Service Location will be the end customer country.

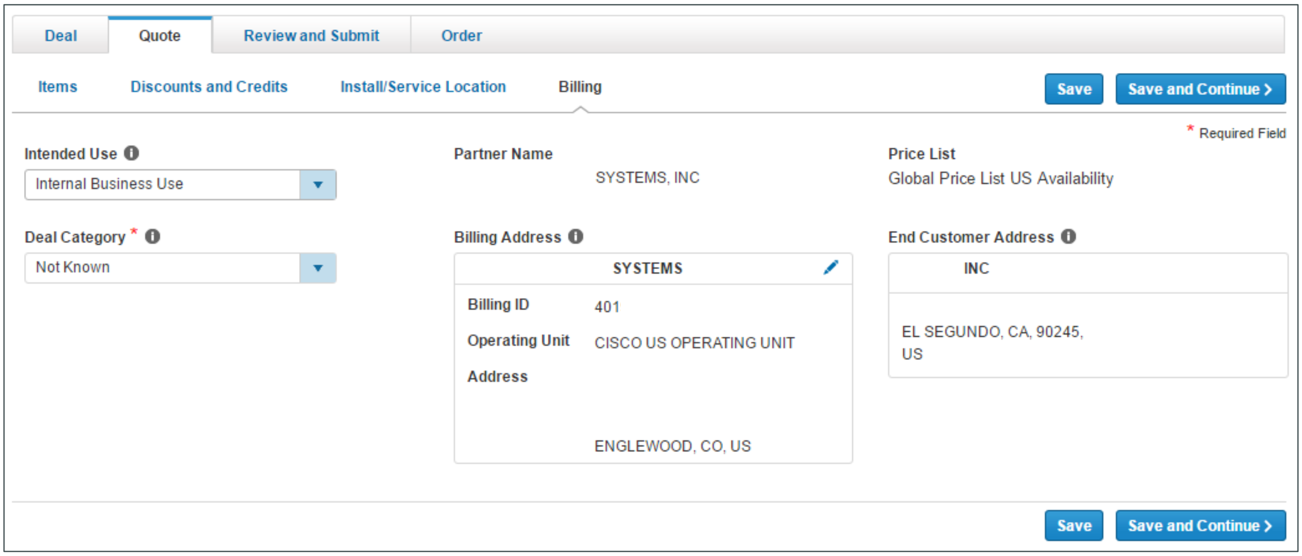
To change the default Service Location, click the Country drop-down arrow and click the appropriate country. To enter a full service to site, click Add a Full Service Location. The Search for Service Location dialog box displays. The steps are the same as editing an Install Site Country details (see Reviewing or Editing the Install Site Information). To change the Service Location for an individual line, select the desired line and click **Edit Service Location**.

Click **Save and Continue** to proceed to the Billing tab.

4.11 Reviewing or Editing Billing Information

To review or edit the billing information, complete the following steps:

1. From the Quote tab, click Billing. The Quote tab: Billing sub-tab displays.



Quote Tab: Billing Sub-Tab

2. Review the price list and partner content.
3. To change the billing address and contact information, click the edit icon. The Select a Billing Address dialog box displays.
4. Click the appropriate radio button and click **Continue**. The dialog box closes.

Note: If you are a tier-1 partner placing product lease orders, then enter or select the Cisco Capital bill-to address and contact. Product and service lease order capabilities are available (see Using Financing Options (For US and Canada only)).

5. Click **Save and Continue** or the **Review and Submit** tab to continue. The Review and Submit tab displays.

5 Reviewing and Submitting the Deal

Depending on the incentive (program and promotion) chosen, either the deal will be submitted for qualification or the quote will be submitted for approval. If the chosen incentive requires qualification, see Submitting the Deal for Qualification. If the chosen incentive does not require qualification, see Submitting the Quote for Approval.

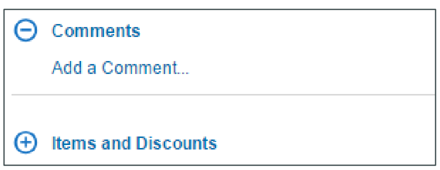
Click (⊕) to expand and review each section on the Review and Submit tab.

5.1 Submitting the Deal for Qualification

The Review and Submit tab displays many sections that change depending on whether the incentive or promotion chosen requires qualification. The options detailed below are with respect to a deal with an incentive or a promotion that requires qualification.

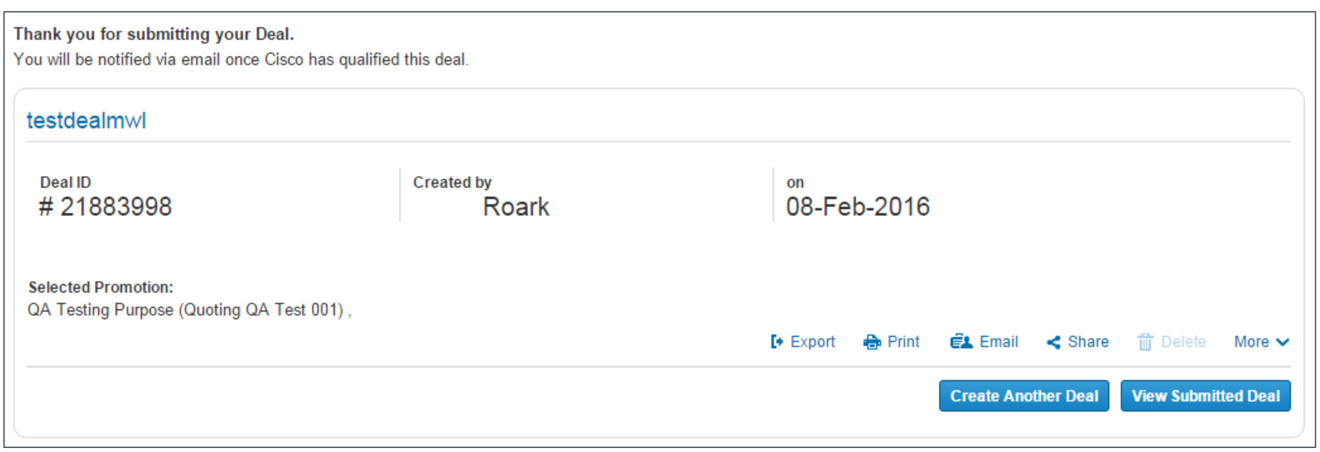
If the chosen incentive requires qualification, complete the following steps:

1. From the Review and Submit tab, to make any changes to Deal Information, click the appropriate icon that displays in red indicating a warning or an error.
2. Optionally, under the Comments section, click Add a Comment to add a comment on this deal.



Comment Section

3. Click **Submit Deal for Qualification**. The Deal Submission confirmation page displays.
4. A confirmation page displays.



Confirmation Page

After the qualification is approved, complete the following steps:

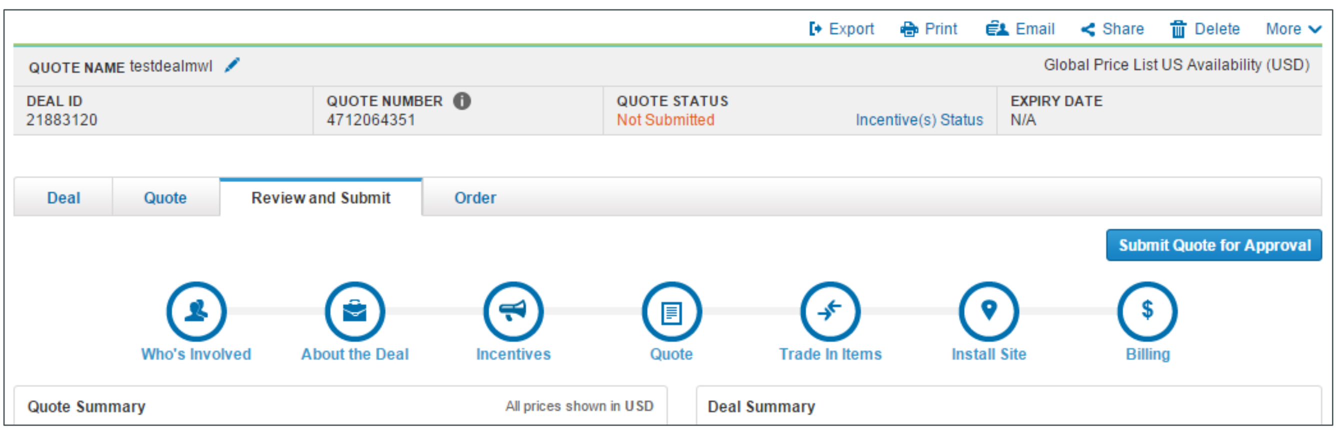
5. Build the quote. See Adding Items.
6. From the Quote tab, click Discounts & Credits to view the details of the promotional pricing.
7. The default view is the Summary View. Click the View By drop-down arrow and click the appropriate option: Discount Type, Discount Details, Unit Net Price, and Product and Service Totals.
8. To see the details of the discount, click **Discount Details**.
9. When viewing the Discounts and Credits is complete, click **Save and Continue**. The Review and Submit tab displays.
10. Continue to Submitting the Quote for Approval.

Note: If an incentive on a deal is rejected, the rejected incentive will be removed from the deal. A rejected incentive will not prevent the rest of the deal from being approved. If all incentives have been rejected, only the contractual discount will apply.

5.2 Submitting the Quote for Approval

The Review and Submit tab displays many sections that change depending on whether the incentive chosen requires qualification.

The options detailed below are with respect to a deal with an incentive that does not require qualification.



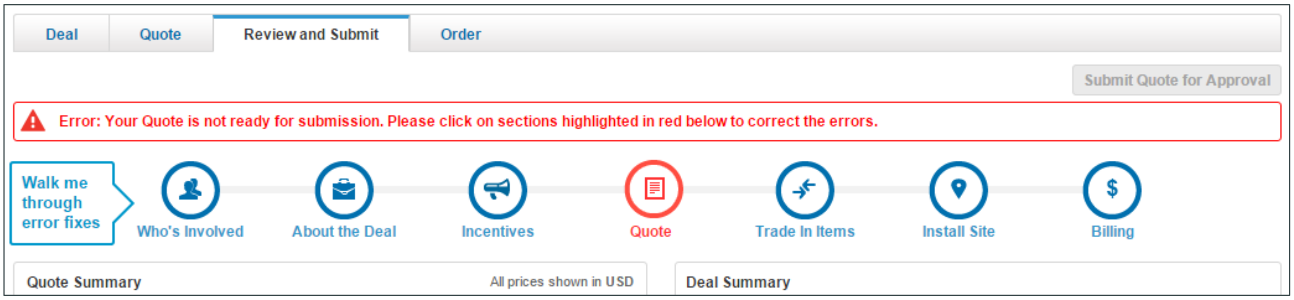
Review and Submit Tab

5.2.1 Reviewing Deal Information Section

The Deal Information section displays the different sections of the quote. If the section is complete with no errors, it displays in blue. If there are warnings or errors, it displays in red.

To make any changes or corrections prior to submitting for approval, click that section's icon and make the changes.

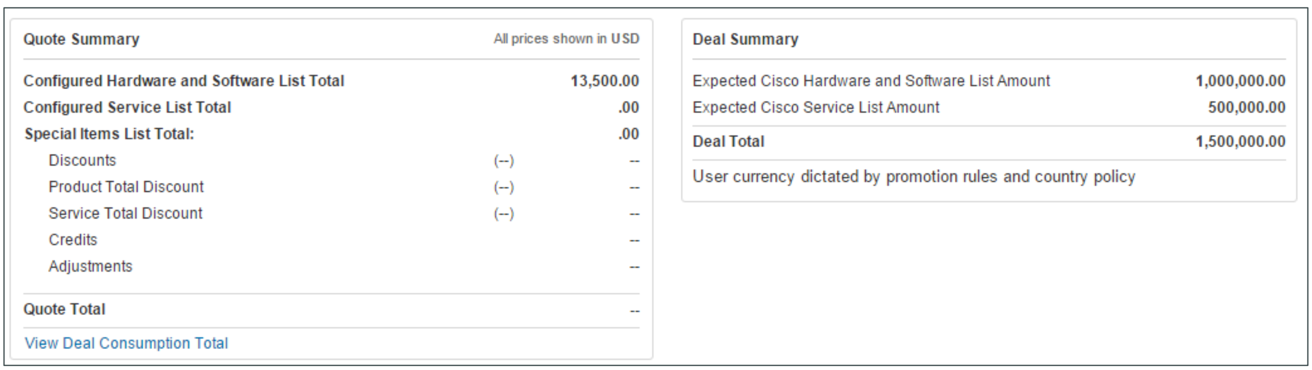
Unless all sections display in blue, the **Submit Quote for Approval** button will be inactive.



Errors on Review and Submit Tab

5.2.2 Reviewing Quote Summary and Deal Summary Sections

Review the quote and deal summary sections. Once the deal or quote is approved, click View Deal Consumption to view what products have been ordered or consumed. The Deal Consumption dialog box displays. Click **X** to close the dialog box and return to the previous page.



Review and Submit Tab: Quote and Deal Summary Sections

5.2.3 Reviewing Try and Buy Section

The Try and Buy (TAB) Program is a global service that allows Cisco customers to try Cisco products for a short period of time before buying them. It is a product sale with deferred invoicing up to a certain number of days, which is referred to as the “trial period”. If you decide not to complete the purchase for any reason, you can return the product, at no charge, prior to invoicing on the first day of possession after the trial period ends.

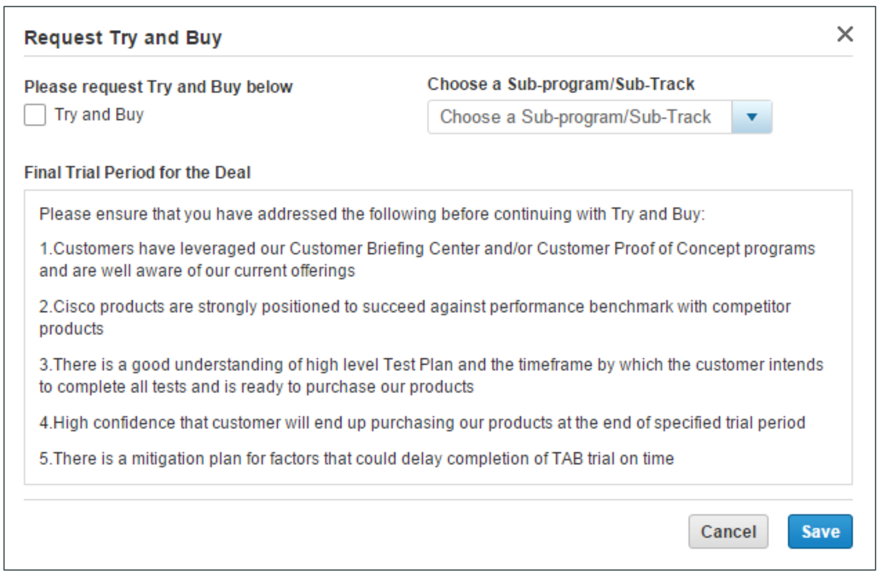
Deal or quote eligibility for TAB is located on the Review and Submit tab. Not all deals are TAB eligible. US Federal partners can request TAA-compliance on Federal TAB orders.

Restrictions for TAB deals:

- May only be combined with OIP, SIP, or MSCP promotions
- Must have a single source of fulfillment (buy method) on the quote
- Are ineligible if include a trade-in item
- Are excluded if they are IronPort or service-only deals/quotes

To request TAB on eligible deals, click Request TAB. For more information about TAB, click TAB Help.

Review and Submit Tab: Try and Buy Section



Request Try and Buy Dialog Box

When you request TAB, the Request Try and Buy dialog box displays. Check the checkbox to request TAB and select the appropriate option from the drop-down menu. Click **Save**.

The TAB section refreshes to display the TAB details.

Review and Submit Tab: TAB Section – TAB Details

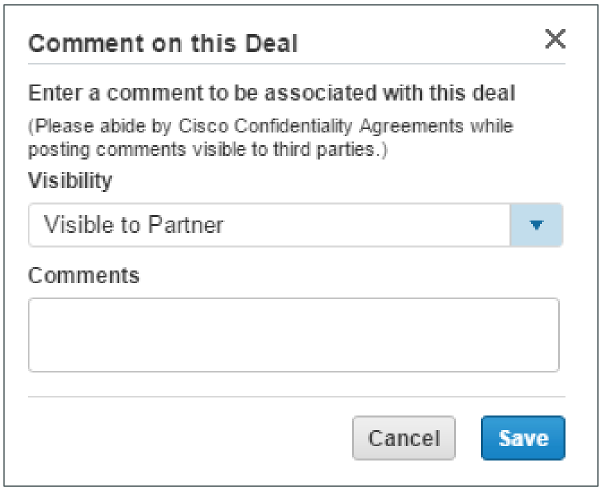
5.2.4 Managing Deviations Section

Deviations are any part of a quote that is not standard. Deviations trigger the creation of a DART. To create a DART using an RNSD, create a transactional deal and reference the RNSD Deal ID.

Click Manage to view progress of the approval process rather than waiting for approval notification.

5.2.5 Reviewing Comments Section

Add a comment, if applicable, by clicking Add a Comment. Comment on this Deal dialog box displays. From the Visibility drop-down menu, select who can view deal comments. Note that Cisco users are able to automatically view comments. Add your comment and click **Save**.



Comment on this Deal Dialog Box

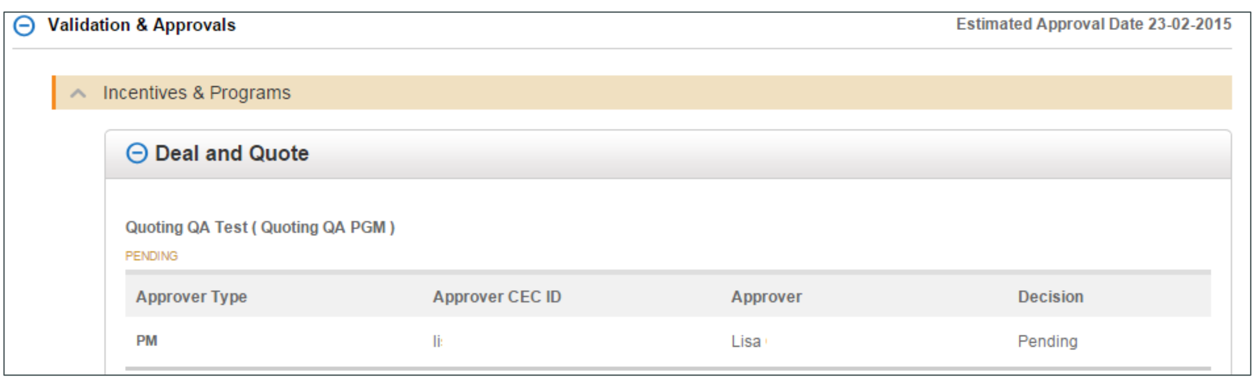
Click **Submit Quote for Approval**. A confirmation page displays.

5.2.6 Viewing Promotion Details

A notification will display above the Deal Summary if the promotion is expiring within 15 days. Once the promotion expires, you will need to recreate the deal.

Click the link in the banner message to view the promotion expiry date.

To view the approver and the approval status of each incentive (program or promotion), scroll down the Review tab. Expand the Validation & Approvals section.



Review Tab: Incentives & Programs

6 Creating a Global Deal

Cisco Commerce > Deals & Quotes Tab > Create Deal

To create a global deal, complete the five-step process. See Global Partner Network.

6.1 Locating an Agent Partner

Locate an eligible local Partner using the GPN website or Partner Locator.

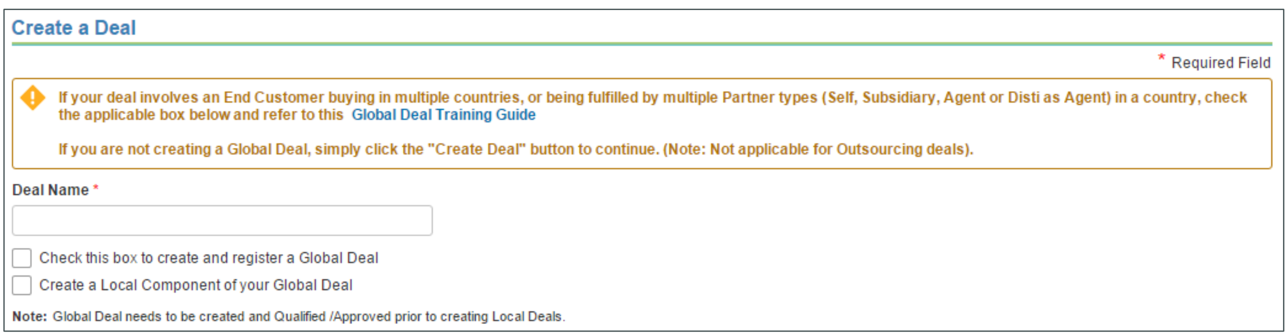
6.2 Registering the Global Deal by Host Partner

As the host partner, you need to register your global deal in Cisco Commerce. To do so, complete the following steps:

1. Click **Create Deal** from the Deals & Quotes tab.

Best Practice: Use the deal name to indicate customer name, project name, and that it is a global deal. For example, “GD-customer name-project name”.

2. Check the “Check this box to create and register a Global Deal” checkbox.



Create a Deal Page

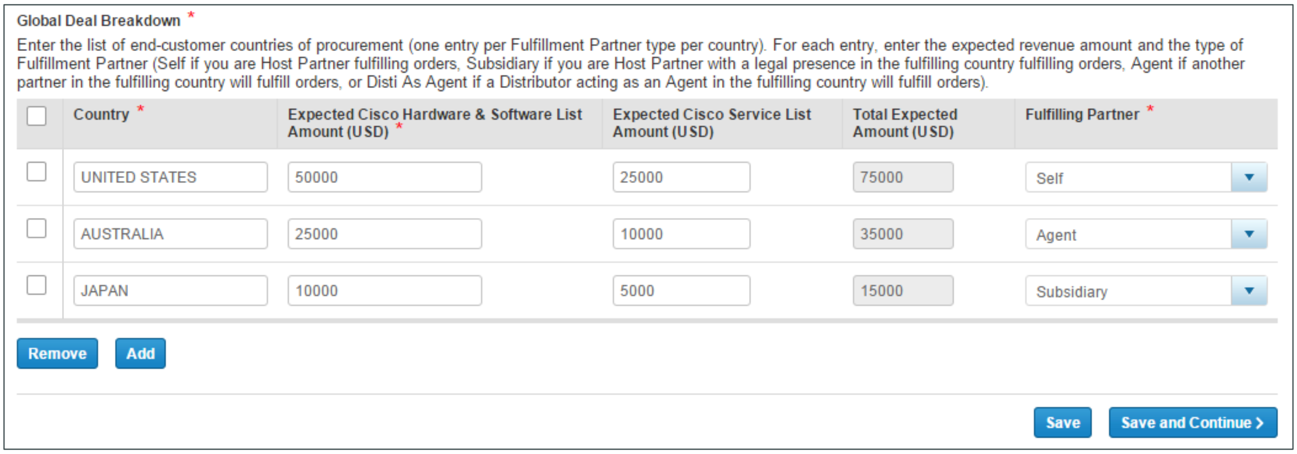
Note: If the Check this box to create and register a global deal checkbox does not display on the page, then the partner company needs to enroll in GPN through Partner Program Enrollment (PPE).

3. Provide the details for Partner, End Customer, and Cisco Channel Account Manager. See Populating Who’s Involved.
4. Click **Create Deal**.

Note: Global deals can only be initiated from the customer’s headquarters location/country.

5. Populate deal information on the About the Deal page. See Selecting the Deal Options.

6. Scroll down to the Global Deal Breakdown section.
7. Click **Add**. The Global Deal Breakdown section refreshes.



Global Deal Breakdown Section – Refreshed

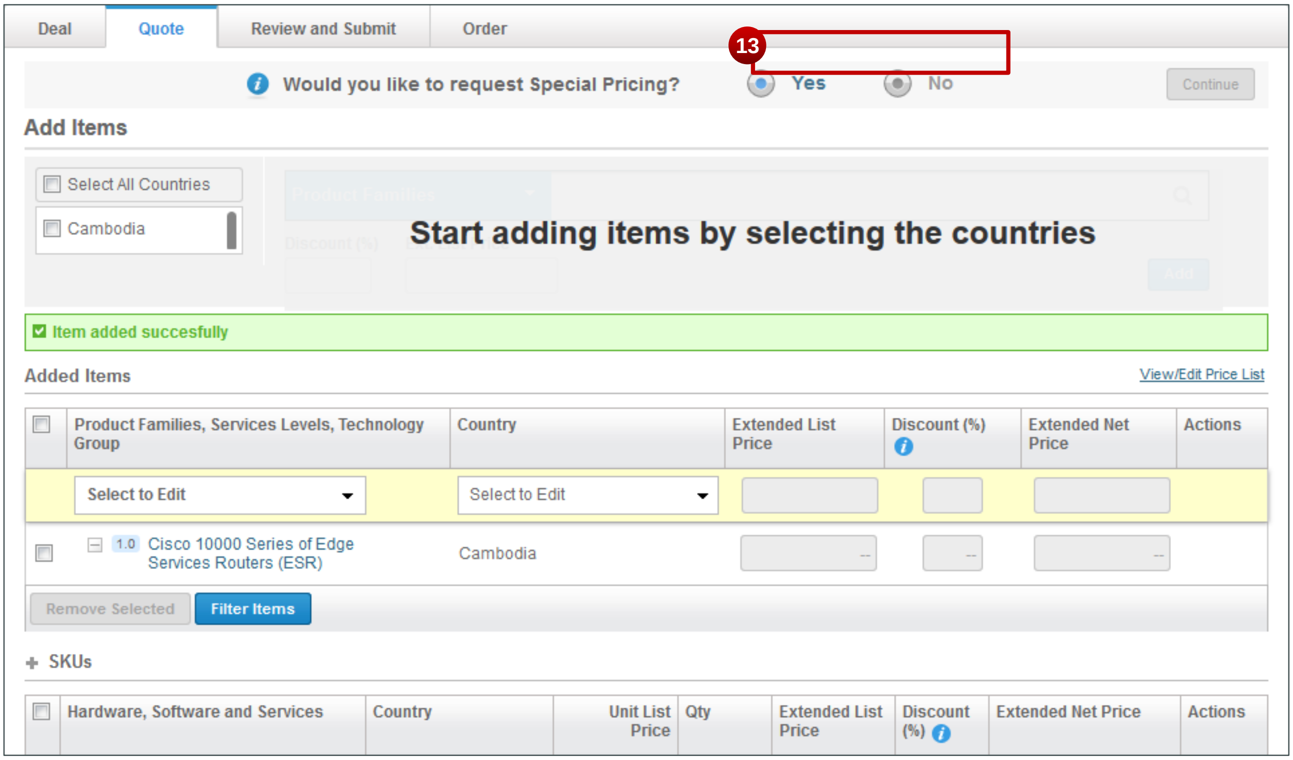
8. Specify the landing countries, the expected hardware & software list amount, and the expected service list amount.
9. Click the Fulfilling Partner drop-down arrow and click the appropriate option to indicate the fulfilling partner (self, agent partner, subsidiary agent, distributor agent). Self is the only option for the headquarters country.

Note: It is critical to provide this information for every country added to the global deal. If a country is missed, the global deal will need to be re-opened, which will delay deal approval. When forecasting sales, try to estimate a reasonable expected Cisco List Amount. Aim to be within 10% of the prediction.

---

10. Click **Save and Continue**. The Incentives tab displays.
11. Select an incentive or continue without one. See Viewing and Selecting Applicable Incentives.

    You can select the eligible incentives on the Incentives sub-tab. The global deal must be eligible for the incentive in the headquarters country. All features of the incentive are fully applicable in the headquarters country; for all other countries in the deal, only the promotional discount will be transferred. If choosing an incentive from the Opportunity Incentive Program (OIP) category, the global deal must have a local component in the headquarters country.
12. Click **Save and Continue**. The Quote tab refreshes.



Quote Tab Refreshed

13. Indicate whether special pricing will be requested. Product SKUs can be selected for discounting. Commercial Finance requires product SKUs for global deal non-standard discounts above 60%.
    - If not, click the No radio button and click **Continue**. The Review and Submit tab displays.
    - If so, click the Yes radio button. The deal becomes non-standard. If applicable, add a bill of materials (BOM) to request special pricing for those items. Check the appropriate country checkboxes under Add Items, select the appropriate items, and click **Save and Continue**. The Review and Submit tab displays.

Note: Upload a high-level BOM by adding items based on country, product family, SKU, or technology group. Check the Select All Countries checkbox or select a group option to include items that will be delivered in all counties. Click **Save and Continue**. This selects the product list for multiple countries at one time.

The price lists are defaulted for the landing countries. To select an optional price list where applicable, click View/Edit Price List. The View/Edit Price List dialog box displays. Click the drop-down arrow and select the appropriate price list for each country. Click **Save**. The View/Edit Price List dialog box closes. Click **Save and Continue**.

---

14. Review the summary information. If there are errors, the system displays links to resolve them.
15. Click **Submit Quote for Approval**. A confirmation page displays.

6.3 Getting Cisco Approval

Once the deal is approved, the system sends a notification to the host partner indicating the global deal is approved.

- For standard deals without special pricing, the approval should take two days. If approval notification is not received within two business days, contact go-gpn@cisco.com.
- For non-standard deals that request special pricing, contact the AMs to negotiate and approve the special pricing.

GPN global deal IDs are frameworks to manage business landing in multiple countries. Global deal IDs are not orderable. You must attach a local deal to the global deal, and that local deal ID is the only orderable ID.

6.4 Registering the Local Deal

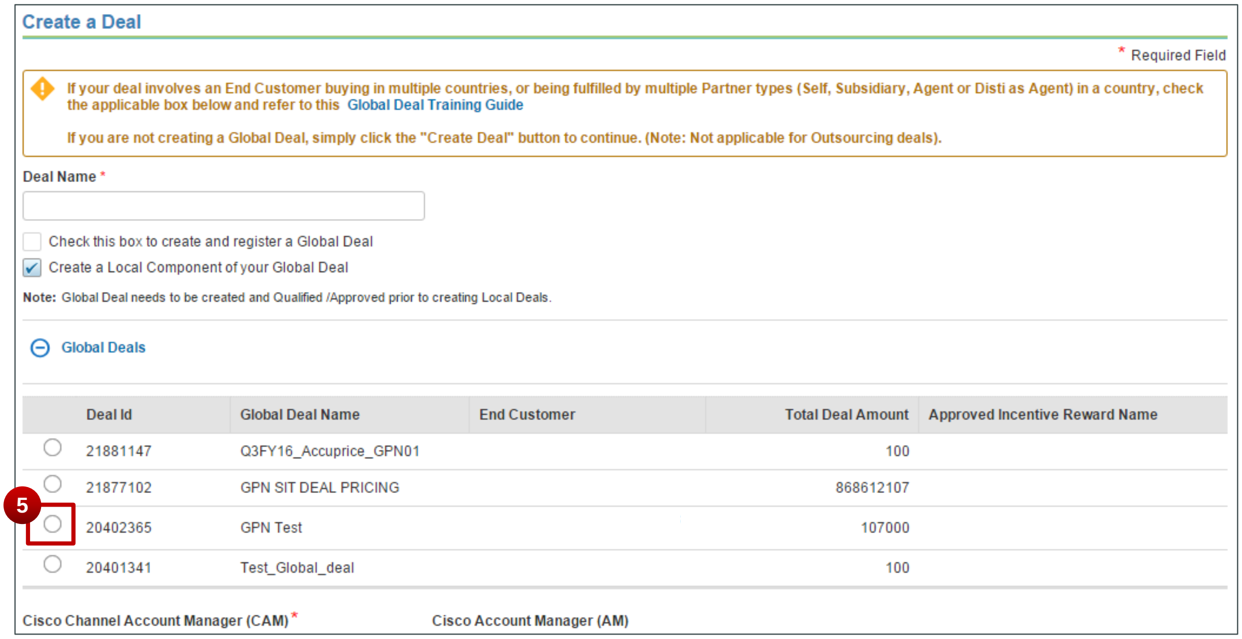
To order, you need to create the local deal in Cisco Commerce.

Note: No transactions (orders) are placed against the global deal. The quote is converted to an order in the local deals.

Once the deal is approved, agent partners convert the quote to an order using the approved local deal ID. Host partners can share the approved deal with the agent partners to execute. Agent partners will receive an e-mail notification from Cisco Commerce, indicating that the host partner has shared a local deal with them.

To register a local deal, complete the following steps:

1. Click **Create Deal** from the Cisco Commerce Deals & Quotes tab. The Create Deal page displays.
2. Enter a deal name.
3. Check the “Check this box to create and register a local component of your Global Deal” checkbox. The Create Deal page expands to show all of your approved global deal registrations.
4. Click the appropriate radio button to select the global deal against which you are registering the local deal. The Create Deal page refreshes to display the countries that were entered in the global deal registration.



Create Deal Page

5. Click the appropriate radio button to select the Country from the global deal breakdown for which you wish to register the local deal.

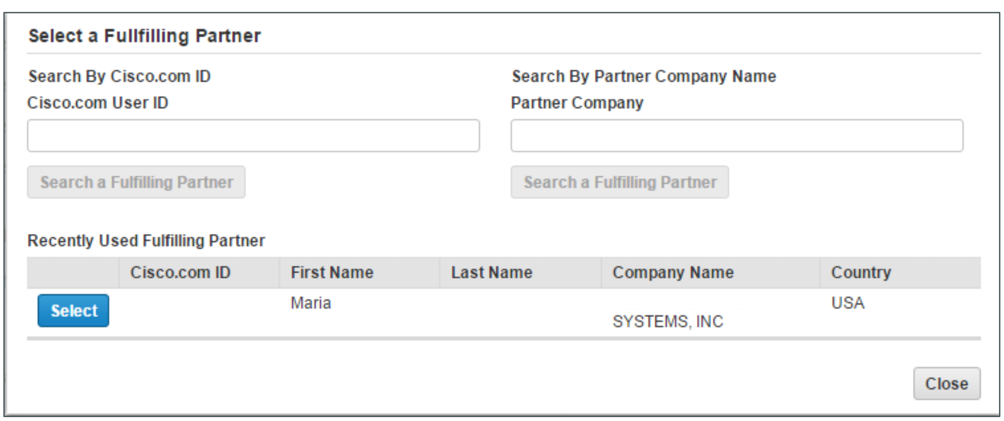
Note: If the applicable global deal does not display, it may not be approved yet. Local deal registration cannot proceed until the global deal is approved.

---

6. Under the Fulfilling Partner section:

   If this local deal in fulfilled by “Self“, the system pre-populates the host partner details as the fulfilling partner.

   To identify the agent partner, click Select a Fulfilling Partner. The Select a Fulfilling Partner dialog box displays.



Associate a Fulfilling Partner Dialog Box

7. Choose the Cisco CAM.
8. Enter the required host partner contact information. Choose the local deal end customer for the landing country and enter their contact information. For more information, see Populating Who's Involved.
9. Click **Create Deal**. The Who's Involved sub-tab displays pre-populated with the information you entered.
10. Click **Save and Continue**. The About the Deal sub-tab displays. The system pre-populates the fields based on the information in the global deal. All fields are editable except Intended Use.
11. Click **Save and Continue**. Incentives (programs and promotions) cannot be added to local deal registration. All deal characteristics are inherited from the global deal, including discounts.
12. Click **Continue**. The Quote tab displays. The appropriate price list is copied from the global deal. Confirm the billing information.
13. Click **Save and Continue**. The Quote tab refreshes.
14. Creating a quote for the local deal is similar to creating a quote for non-GPN orders. The host partner finalizes the quote by adding SKUs or uploading a saved BOM and/or configuration. For more information on adding products, see Building a Deal.
15. Select the appropriate buy method(s).
16. Click **Save and Continue**. The pricing approval displays.
17. Click **Save and Continue**. The Review and Submit tab displays.
18. To submit the local deal, click **Submit Quote for Approval**. Most local deals will be automatically approved.

If the local deal is landing in Australia, Canada, Japan, or China, contact the GPN ops team at go-gpn@cisco.com to request support for discount normalization.

6.5 Executing the Local Deal

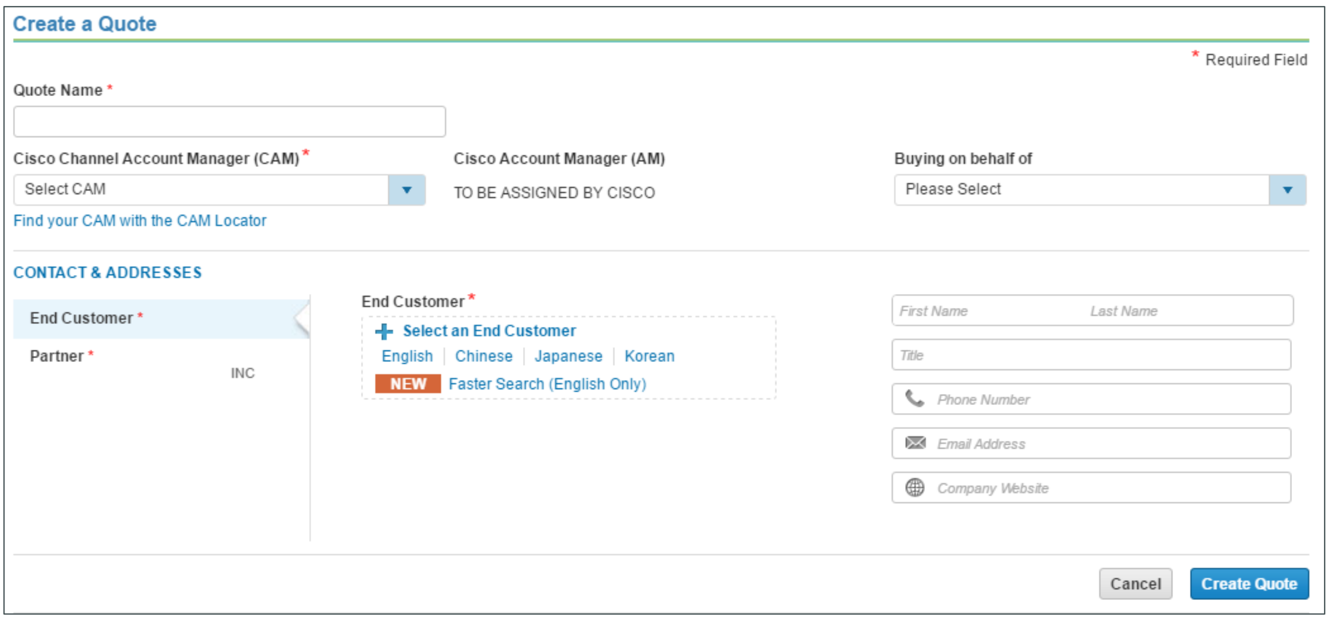
Execution of the local deal is completed by the agent partner. Once the deal is approved, the host partner contacts the agent partners about ordering in each landing country. Agent partners will convert the quote to an order using the approved local deal ID and the normal local ordering methods.

- A distributor agent as the fulfilling partner on the local deal may use any of these methods to order: auto DART, Netprice, or CBN.
- Partner agents need the local deal ID to order using local methods.
- Host partners fulfilling the deal themselves also use the local deal ID to order (headquarter orders).
- The host partner can track all the local deals via the global deal.

7 Creating a Quote

Create a quote when only pre-approved incentives (programs and promotions) will be applied. To choose a special incentive, follow the steps for creating a deal (See Creating a Deal).

From the Deals & Quotes tab on the Cisco Commerce homepage, click **Create Quote**. The Create a Quote page displays. Enter a deal name.



Create a Quote Page

7.1 Populating Who's Involved

7.1.1 Reviewing the Partner Information

The partner name is automatically populated by the system.

7.1.2 Populating the Partner Contact Information

Ensure that all mandatory information fields, indicated with a red asterisk (*), are populated. To automatically populate the Partner Contact section, check the "Use the Contact Details in my User Profile" checkbox. The partner contact information populates. Alternatively, click each field and enter the appropriate information.

7.1.3 Choosing an End Customer

To populate the end customer information, see Populating the End Customer Section**Error! Reference source not found.**.

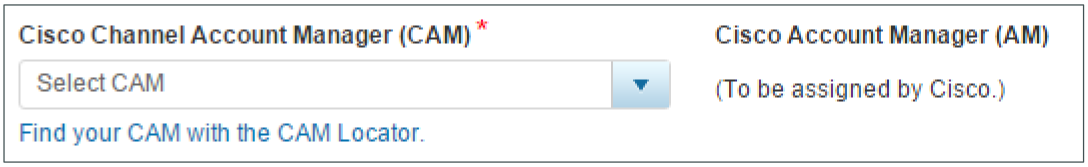
7.1.3.1 Adding End Customer Contact

You can add the end customer contact information here, or the Reseller can add it later. This information is not required.

To add the contact information, click each field and enter the appropriate information.

7.1.4 Populating the Cisco Section: CAM

Populate the CAM section. See [Populating the Cisco Section: CAM].



Cisco Section

Once all fields are populated on Create a Quote page, click **Create Quote**. The About the Deal tab displays.

7.2 Populating About the Deal Information

Populating the deal information for a quote is the same as populating it for a deal.See Populating Information About the Deal.

Click **Save and Continue**. The Quote tab displays.

7.3 Populating the Quote Tab

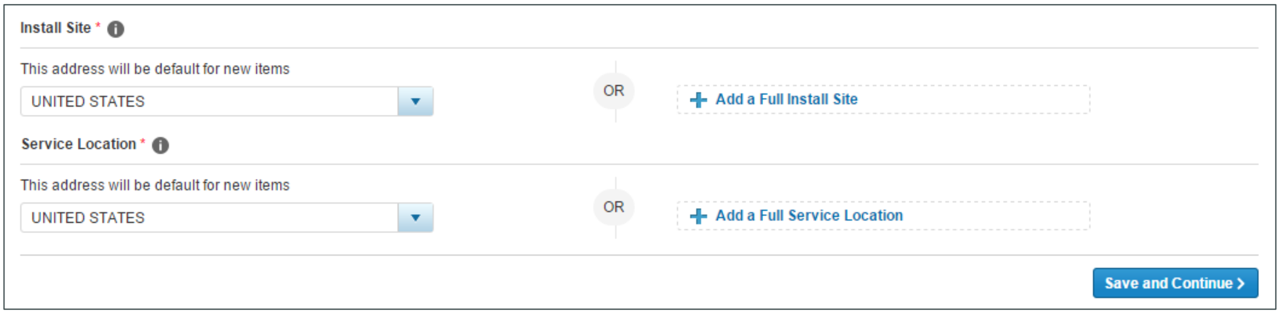
There are three sections on the Quote tab: Billing Information, Buy Method, and Install Information. Specify the Service To information if you are transacting SaaS Subscriptions.

Populate the appropriate information in the Quote tab. See Providing Buy Method and Install Site.

- Populating the Billing Information: To change the billing information, click the edit icon. The Select a Billing Address dialog box displays. Click the appropriate radio button and click **Continue**.
- Populating the Buy Method: To choose the buy method, click the Buy Method drop-down arrow and select the appropriate option. The chosen method is applied as the default buy method for all applicable line items. The buy method can be changed for an individual line on the Items tab.
- Choose appropriate Install Site and Service To options.

Best Practice: Adding a full install site enables validations and pricing. The address must be accurate to quote services correctly. If full address information is not known, the country information must be valid. Adding a full install site enables validations and pricing. The price list for services is determined by the Install Site country.

To populate the install site and service to information, see Adding an End Customer. The steps are similar.



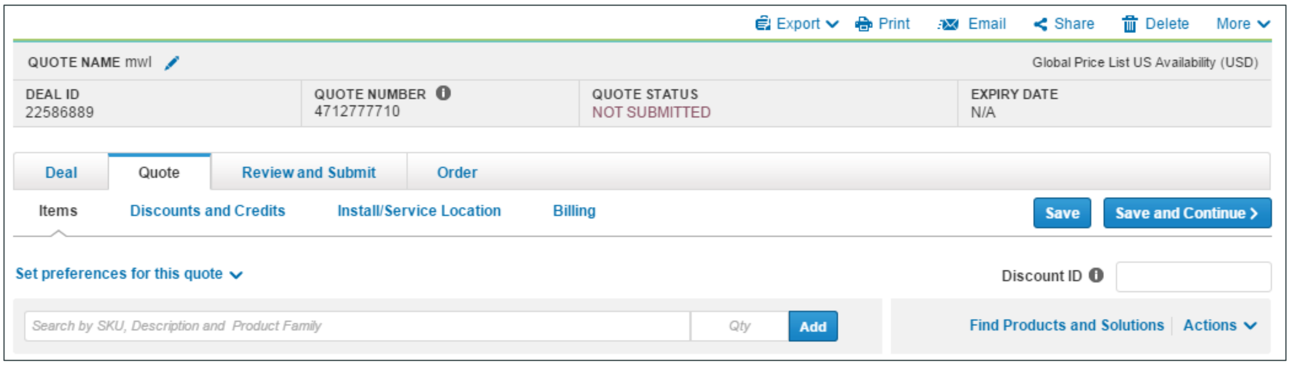
Install Site

Click the edit icon to populate a different full install site. Alternatively, click the delete icon to remove the populated install site.

Click **Save and Continue**. The Quote tab refreshes to display four sub-tabs.

8 Building a Quote

Best Practice: While working through these multiple portions of the Items page of the Quote tab, click **Save** periodically to ensure that work is saved. The work saves, and you will remain on the current page.



Quote Tab: Items Sub-Tab

From the Quote tab: Items sub-tab, you can:

- Apply a Reusable Non-standard Discount (RNSD) to the quote for RNSD-eligible items (see Entering Discount ID to Apply RNSD)
- Add items (see Adding Items)
- Add services (see Adding Services)
- Renew software subscriptions (see Renewing Software Subscriptions)
- Add trade-in items (see Adding Trade-in Items)

8.1 Entering Discount ID to Apply RNSD

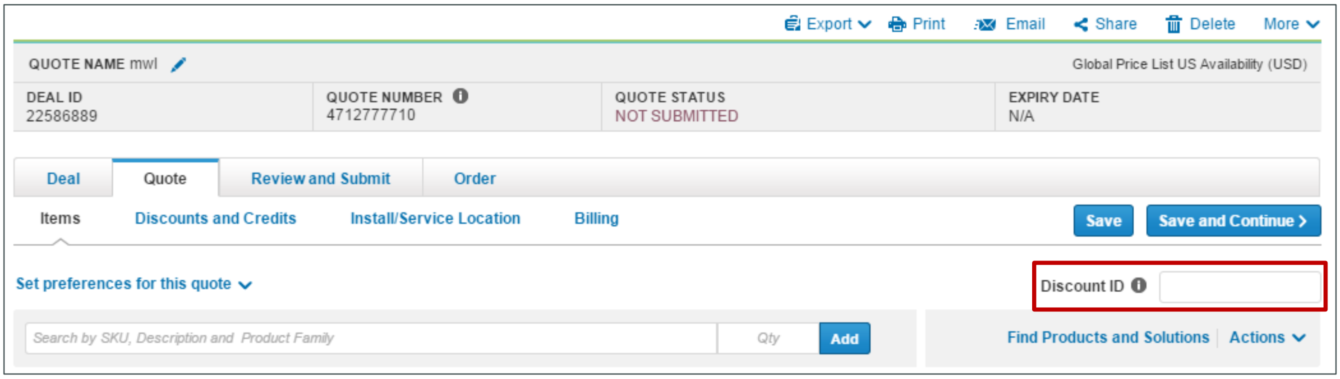
In Cisco Commerce, you can apply an RNSD to an order or to a quote by referencing the discount ID number that was initiated by the Cisco sales team and communicated by a Cisco Account Manager (AM). You can also create a transactional quote referencing an RNSD to ensure the Cisco-approved pricing is automatically applied to the quote. It is only necessary for you to create a transactional quote if the order will be fulfilled through distribution.

Best Practice: Go straight to ordering and reference the RNSD discount ID (see Cisco Commerce Order User Guide), rather than starting with a quote, unless the order will be fulfilled through distribution.

8.1.1 Applying the RNSD

To apply an RNSD discount to eligible items on the quote, complete the following steps:

1. From the Quote tab, click the Discount ID field.



Discount ID Field

2. Enter the RNSD ID received from the AM.
3. Press Enter on your keyboard. Once added, any RNSD product or service added to the quote will have the discount applied automatically.

Note: You can apply discounts to spare equivalents. For example, if an RNSD is set up for WS-C6509-E, the discount will be applied on both WS-C6509-E and WS-C6509-E=.

Note: The system will display warnings and provide explanations when the RNSD is consumed, not in approved status, expired, not migrated to EDMS, not an RNSD, or the deal ID is not found.

---

4. Add the desired products to the quote (see Adding Items).
5. To modify the discounts manually at the line level, click Discounts & Credits and enter the discount in the Effective Discount % field. See Reviewing Discount and Credits.
6. Complete the remaining processes for the quote and submit the quote for approval. If the partner has entered all the discount and quoting information correctly, the quote is approved automatically upon submission.

8.2 Adding Items

To add items to the quote, use one of the following four methods:

- Finding items (see Finding Items Using a Search)
- Adding a SKU (see Adding Items by SKU)
- Importing an estimate or a saved configuration (see Importing an Estimate or a Configuration)

- Adding different types of SKUs (see Adding Different Types of SKUs)

8.3 Using Optional Functions for Individual Line Items

See Using Optional Functions for Individual Line Items to use additional functionalities for individual lines.

8.4 Choosing Options / Resolving Issues

See Choosing Options and Resolving Issues to select or change options for items.

8.5 Setting Quantities for Items

To set quantities of items when populating a quote, see Setting Quantities for Items.

8.6 Adding Services

To add services, see Adding Services.

8.7 Renewing Software Subscriptions

To renew software subscriptions through a quote, see Renewing Software Subscriptions.

8.8 Adding Trade-in Items

To add trade in items to a quote, see Adding Trade-in Items.

9 Reviewing Discounts and Credits

You can view the Unit List Price and the Extended List Price in the Quote tab: Discounts & Credits sub-tab for each line. See Reviewing Discounts and Credits.

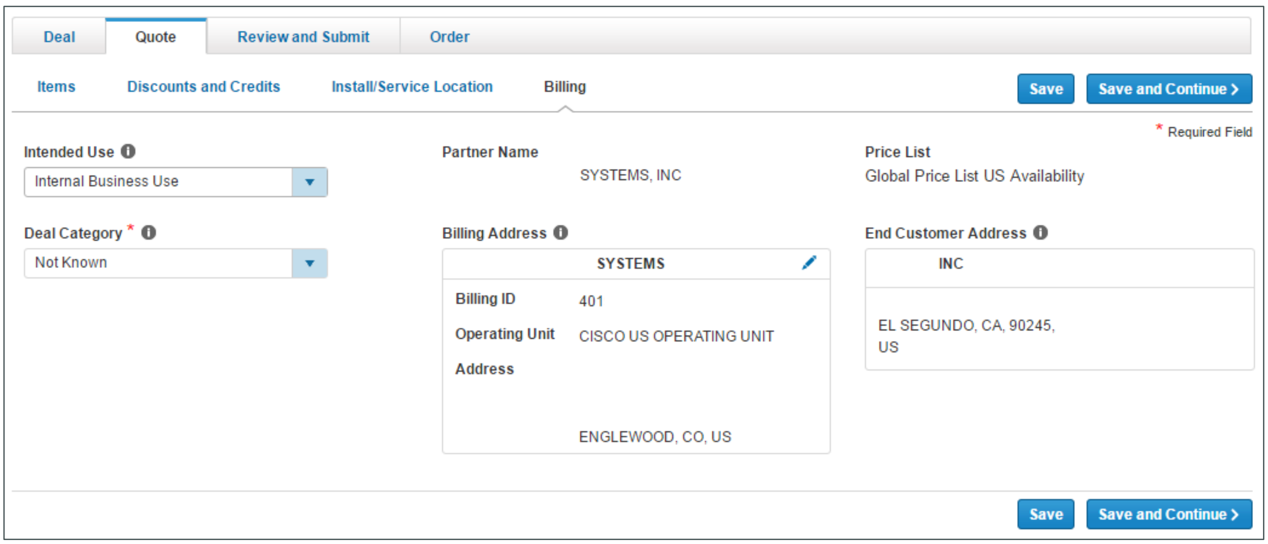
9.1 Reviewing or Editing the Install Site Information

To review or edit the install site information, see Reviewing or Editing the Install Site Information.

9.2 Reviewing or Editing Billing Information

To review or edit the billing information, complete the following steps:

1. Click **Billing**. The Quote tab: Billing sub-tab displays.



Quote Tab: Billing Sub-Tab

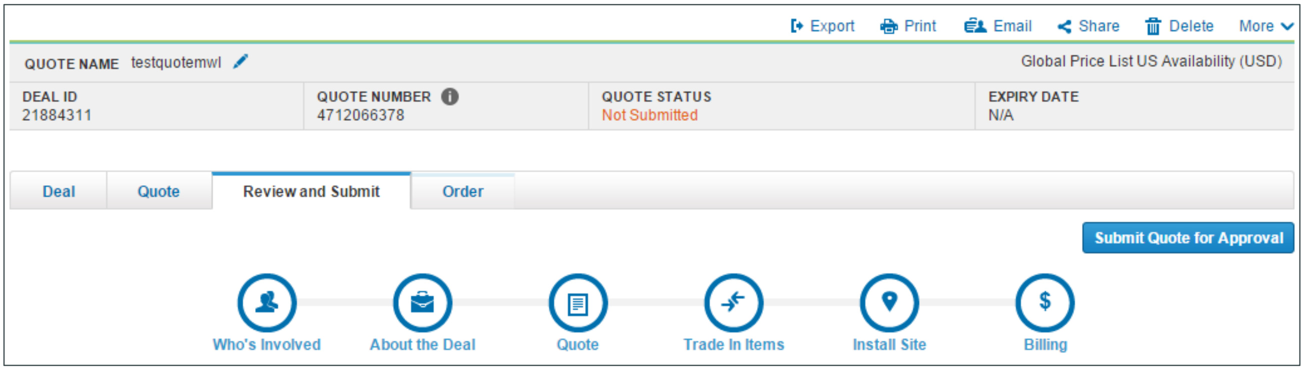
2. Review the price list, partner name, and end customer. These fields display, but are not editable.
3. The Intended Use drop-down menu is automatically populated from the defaults set in My Profile and Preferences section. To change this information, if applicable, click the Intended Use drop-down arrow and click the appropriate option (hover over the information icon to learn more about Intended Use options). Incentives and promotions are offered for certain Intended Use deals. Ensure that the Intended Use is accurate. For information on Managed Service options, see Managing the Managed Service Provider Option.
4. Click the Deal Category drop-down arrow and click the appropriate option. Hover over the information icon to learn more about Deal Categories.
5. The billing address and contact information is editable. To change this information, click the edit icon.
6. The Select a Billing Address dialog box displays. Click the appropriate radio button and click **Continue**. The dialog box closes.

Note: If you are a tier-1 partner placing product lease orders, enter or select the Cisco Capital bill-to address and contact. Product and service lease order capabilities are available (see Using Financing Options (For US and Canada only)).

7. Click **Save and Continue** to continue. The Review and Submit tab displays.

To continue the process of creating a quote, see Reviewing and Submitting the Quote.

10 Reviewing and Submitting the Quote



Review and Submit Tab

10.1 Reviewing and Submitting the Quote

For the following sections, the steps are the same as indicated in creating a deal (see Submitting the Quote for Approval).

- Deal Information section
- Quote Summary section
- Deal Summary section
- Try and Buy section

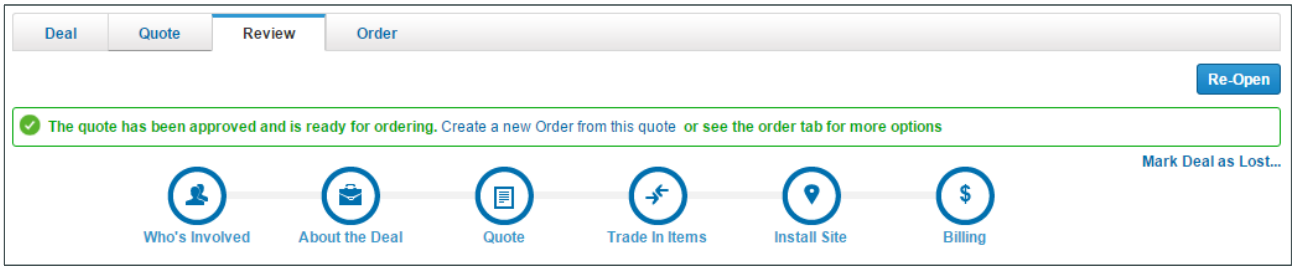
Note: TAB is not applicable for RNSD quotes.

- Manage Deviations section
- Comments section

Note: Partners in the Americas and Canada can request special pricing through an option on the Quote page: Review tab. If a US or Canada partner creates a quote with no trade-in items and distributor fulfillment only, the Request Special Pricing checkbox displays. See Requesting Special Pricing.

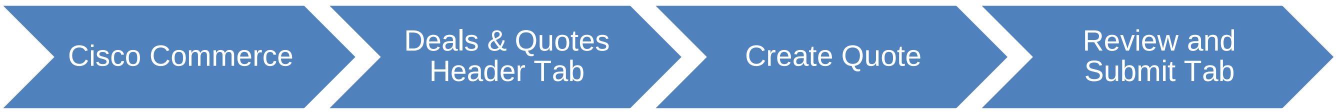
Click **Submit Quote for Approval**. A confirmation page. A message that the quote has been approved displays at the top of the page.

Click **View Submitted Quote**. The quote header information displays. The quote status is now Approved.



Approved Quote

10.2 Requesting Special Pricing



If you are a partner in US and Canada, you can create a quote to request special pricing, also known as a non-standard discount. A request for special pricing can be done in two ways:

- You share the quote using the share functionality with a Cisco Account Manager (AM) and request special pricing with a justification.
- As a partner in the US or Canada fulfilling through distribution, you can create a quote with no trade-in items and check a checkbox on the Review and Submit tab to indicate the request for special pricing

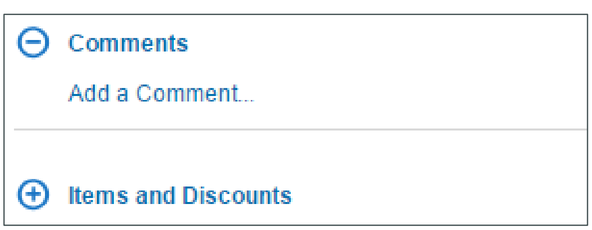
To request special pricing using the checkbox on the Review and Submit tab, the following criteria must be met:

- Only US and Canadian partners
- No trade-in items can be added to the quote
- Fulfillment must be through distribution only
- Can only create a quote (not a deal)

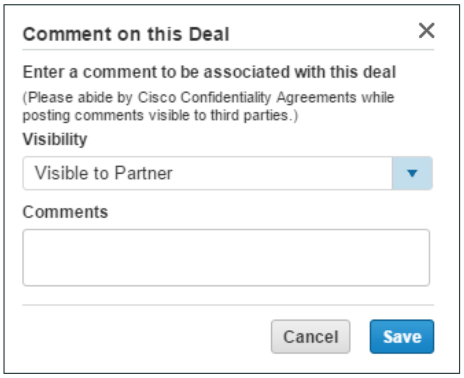
10.2.1 Adding a Justification

On the Review and Submit tab, scroll down to the Comments section to add a justification for the special pricing on the quote.

1. Expand the comments section.
2. Click Add a Comment. The Comment on this Deal dialog box displays.



Comment Section



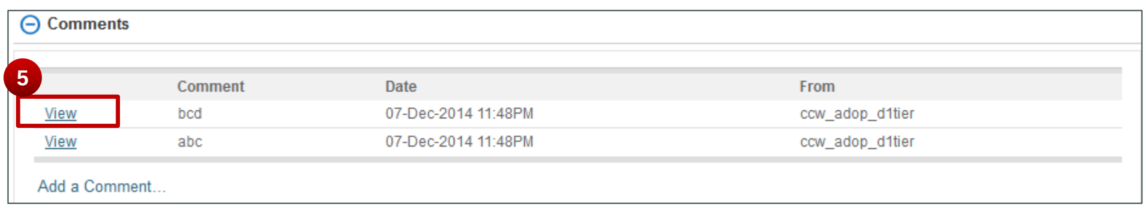
Comment on this Deal Dialog Box

3. From the Visibility drop-down menu, select who can view deal comments. Note that Cisco users are able to automatically view comments.
4. Click the Comments field and include the discount being requested and the justification for the special pricing. Be very specific and include any notes from Cisco's team.

Best Practice: Copy the justification so as to paste it into the body of the message that gets shared with the Cisco AM. See [Getting Started with Cisco Commerce User Guide]() to learn how to share a quote.

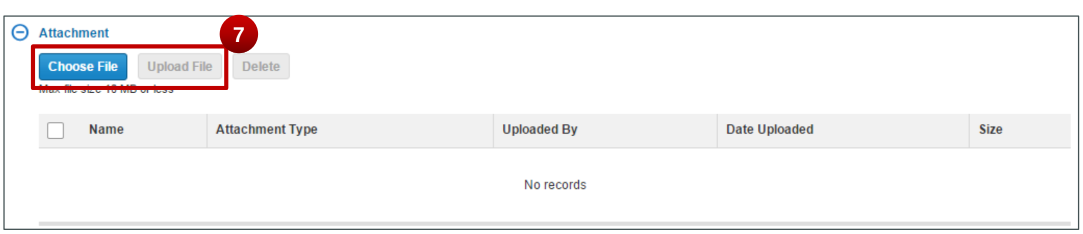
---

5. If there are multiple comments, they will display in rows. Click View to view them.



Comment Section with Multiple Comments

6. If there are any attachments with the request, scroll to the Attachment section.
7. Click **Choose File** to browse for the file and then click **Upload File**.



Add Attachments

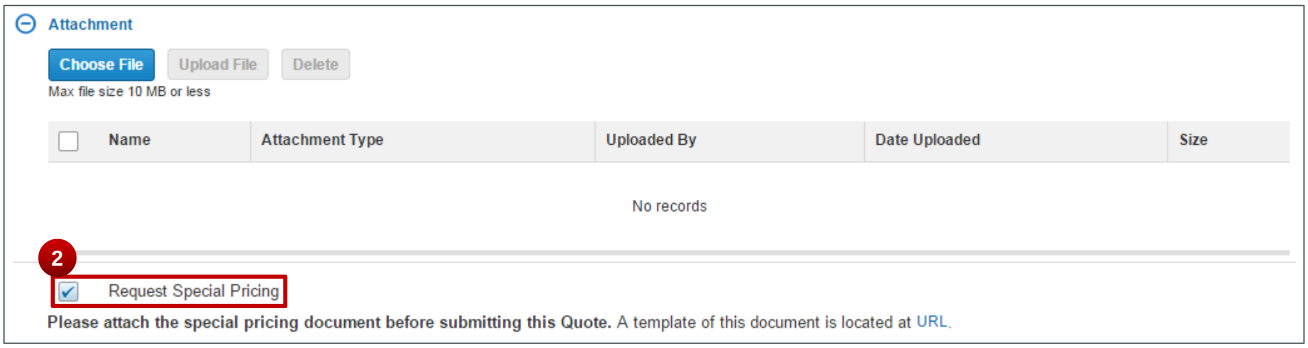
8. If there are multiple attachments, they will display in rows. Click View to view them.
9. Alternatively, check the checkbox for each attachment and click the delete icon to delete them.

10.2.2 Using Request Special Pricing Checkbox

If you are a partner in the US or Canada fulfilling through distribution and creating a quote with no trade-in items, a checkbox displays on the Review and Submit tab to indicate a request for special pricing.

Complete the following steps to use the Request Special Pricing checkbox:

1. Ensure all appropriate steps have been taken and information filled in on the Review and Submit tab.
2. Scroll down and check the Request Special Pricing checkbox to indicate the quote is marked for special pricing.



Request Special Pricing Checkbox

Best Practice: This section does not apply if you are a partner outside of the US or Canada. Partners in these regions share a quote with the AM to request special pricing.

10.2.2.1 Uploading a DART Template

Once the Request Special Pricing checkbox is checked, a message displays and gives the link for a special pricing document, the Deviation Authorization Request Tool (DART) template. This file needs to be filled in and uploaded before submitting the quote for approval.

1. Click URL to download a local copy of the DART template.
2. Populate all the necessary information on the template.
3. Expand the Show/Hide Attachments section.
4. Click Upload a file to attach the completed special pricing DART document.
5. If there are multiple attachments, they will display in rows. Click View to view them.
6. Alternatively, check the checkbox for each attachment and click the delete icon to delete them.
7. To submit the quote for approval click **Submit Quote for Approval**.

After the quote with the request for special pricing is shared with the Cisco AM and submitted for approval, you can monitor the status of the quote on the Deals & Quotes tab.

Once the AM agrees to the special pricing and approves the non-standard discount, you can:

- Convert the approved quote into an order.
- Reopen the approved quote to modify the discount and resubmit it for final approval (see Modifying Discounts in Re-opened Quotes).

11 Creating a Quote for Service-only Order

For details on how to detach, and subsequently order, services, see the Cisco Commerce Service Only Quick Reference Guide.

Please note that if you have detached services from your order after May 22, 2016, service lines containing all necessary product information will be automatically added to the original quote. See the Ordering Detached Services QRG for more information.

12 Re-opening an Approved Deal or a Quote

To re-open an approved quote, Search for a quote (see Getting Started with Cisco Commerce User Guide). Click the deal ID next to the appropriate quote. The quote opens in the Review tab.

Click **Re-Open** on the Review tab. When you reopen a deal, the Deal status is changed to 'More Information Required'. You then have the option to revise or edit the deal, select or deselect incentives and re-submit it for qualification/approval.

If the deal characteristics are changed, then incentives selected may be impacted. In this case, the deal will need to be re-submitted for qualification for all incentives. If the deal characteristics are not changed and new incentives are added, then only select incentive will require qualification.

Note: Once a quote has been re-opened and changed, it may need to be re-approved. A quote would be resubmitted for approval in the following cases:

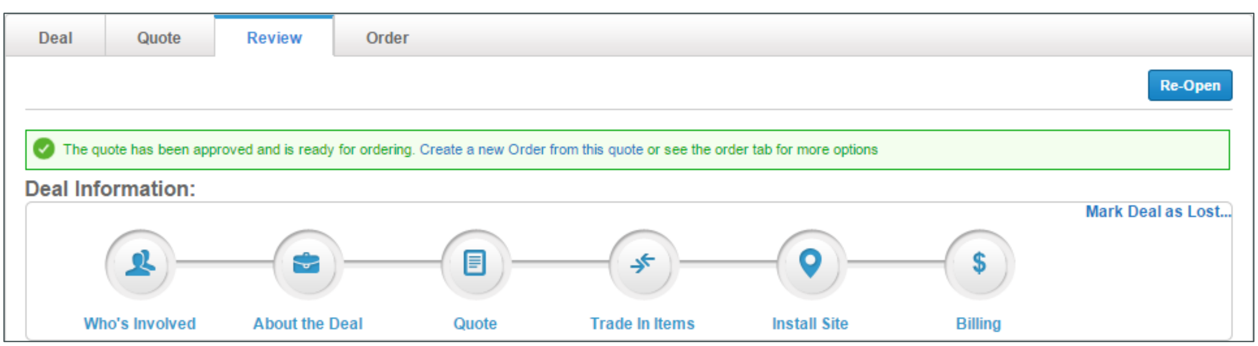
- If a configuration is replaced with another configuration in the same product family, but the new price exceed variance limits
- If a configuration is replaced with another configuration outside of the original product family
- If services are added or removed from another family, other than what was originally approved
- If parts of the configuration are added or removed, other than in the original product family
- If needed parts are removed and defined as a spare

12.1 Marking a Deal as Lost

When a deal is lost, update the status of the deal in Cisco Commerce as "Lost". The deal ID is still searchable, but is not useable. No edit functions are available. If the opportunity to offer this deal presents itself again, then restart creating the deal from the beginning.

To mark a deal as lost, complete the following steps:

1. Search for a quote (see Getting Started with Cisco Commerce User Guide).
2. Click the deal ID next to the appropriate quote. The quote opens in the Review tab.



Approved Quote: Review Tab

3. Click Mark Deal as Lost. The Mark the Deal as Lost dialog box displays.
4. Click **Continue**. The Deals and Quotes page refreshes. The status indicates Lost.
5. Alternatively, click **Cancel**. The dialog box closes.

12.2 Editing a Quote

To edit an unsubmitted quote, click the deal ID. Make any changes as necessary.

To edit an approved quote, the quote must be "re-opened" by clicking **Re-Open** on the Review Tab. If a quote is re-opened and edited, it may require additional approvals. See Re-Opening an Approved Deal or a Quote for more information on the circumstances under which a quote would need to be reapproved and which changes trigger re-approval.

Once re-opened, the following previously completed functions can be repeated or changed:

- Add or remove items: see Adding Items
- Add or remove options for items: see Choosing Options and Resolving Issues
- Add or remove services: see Adding Services

Additional functionality includes:

- Mark Deal as Lost: see Marking a Deal as Lost
- Add or remove Try and Buy: see Reviewing Try and Buy Section
- Change Quantity: see Modifying Quantity in Re-opened Quotes
- Change Discounts: see Modifying Discounts in Re-opened Quotes
- Compare Versions or Restore to Previous Version: see Compare Versions or Restore to Previous Version

12.2.1 Modifying Quantity in Re-opened Quotes

When you fulfill through distribution, you have visibility to the transactions that have occurred on the quote via distribution using Point of Sale (POS) information. Any attempt to update a line item in the quote that has been marked as POS, the system notifies you. The system provides guidance on valid modifications that you can make.

12.2.2 Modifying Discounts in Re-opened Quotes

You can modify the discounts and apply non-standard discounts with standard discounts on an RNSD quote. In a quote, minor line discounts are populated when the discount is entered at the primary level. Click **+** to expand the line item and edit at the minor line level. Quotes are automatically approved if the discounts entered are less than the approved threshold and have no other non-standard components.

1. Request Non-Standard Discount/Duration: In Americas and APJC, you can request a non-standard discount and/or non-standard duration. From any tab within a deal or quote, click **Share** in the Common Utilities bar. Enter the AM credentials and enter a request for a non-standard discount/duration into the Message to New Recipients field. Click **Save and Close**.

In Americas, partners can request non-standard pricing on quotes that have all lines fulfilled by distributors, see Requesting Special Pricing.

2. Submit Quote for Approval: If the AM agrees to the non-standard discount, open the quote, ensure all details on the quote are complete, and submit the non-standard quote for approval. Monitor the status of the quote from the Cisco Commerce Deals & Quotes tab.
3. Re-open Quote: Once a non-standard quote is approved, you can modify it. Click the Deal ID on the Cisco Commerce Deals & Quotes tab, and re-open the quote by clicking **Re-Open**.
4. Modify Discount: To modify the non-standard discount, click Discounts & Credits. Modify the discount either at the line level or at the header level.
    - Line level: On the appropriate lines, enter the discount in the Effective Disc % field. Modifications can be entered on major and minor lines.
    - Header level: Click Update Quote Discounts. Modify the overall quote discount for all products and services affected by the Discount in the Effective Discount % field. Click **Save**.

    Discounts, lead time, and final pricing information are available only for items fulfilled by Cisco.

    Discount modifications do not apply to trade-in credits.
5. Submit for Approval: When the modified quote is ready to be submitted, click **Submit Quote for Approval** on the Review and Submit tab.

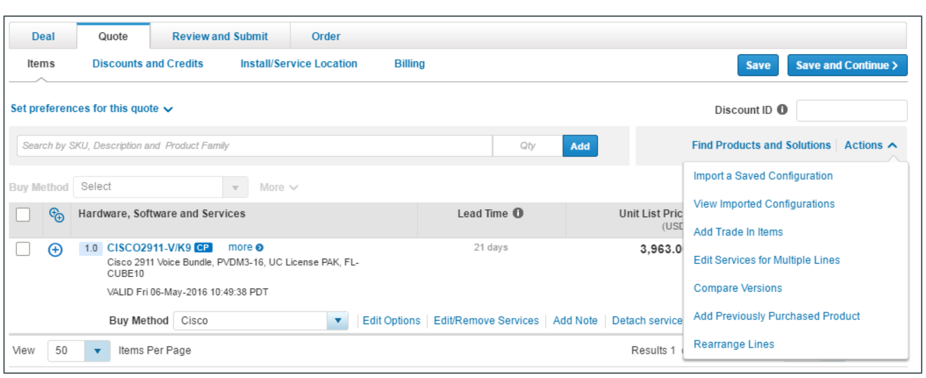
12.3 Compare Versions or Restore to Previous Version

12.3.1 Compare Versions

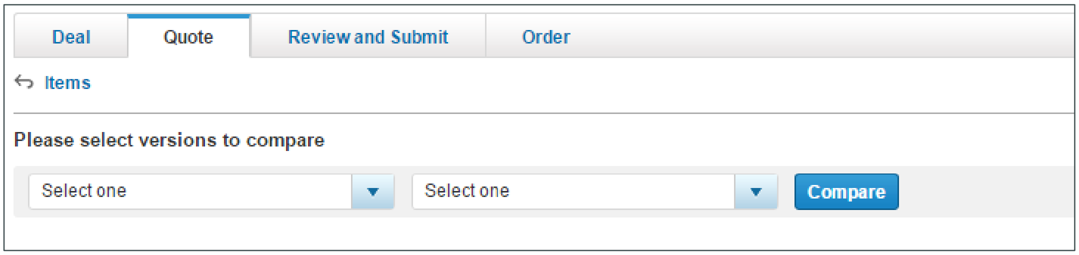
Once a quote is re-opened, you have the option of comparing different versions of the same quote.

To compare versions, complete the following steps:

1. From the Quote tab: Items sub-tab, click to expand the Actions drop-down menu, and then click Compare Versions. The page refreshes, with drop-down menus that enable you to compare versions.



Reopened Quote: Compare Versions Link



Compare Versions Page

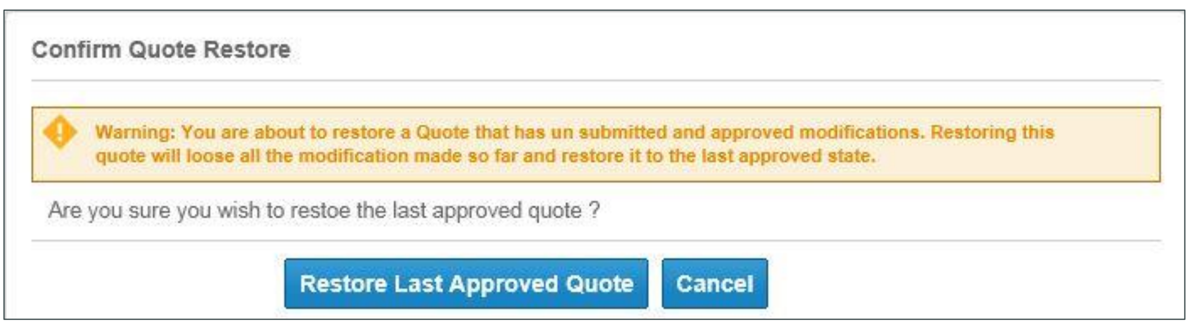
2. Use the drop-down menus to select the versions that you want to compare.
3. Click **Compare**. The page refreshes, showing details from the selected versions.
4. Click Items to return to the re-opened quote.

12.3.2 Restore a Re-opened Quote to the Last Approved Quote

Once an approved quote is re-opened, a new option displays on the Quote tab: Items sub-tab.

To discard any changes made to the re-opened quote and to revert to the previously approved version, complete the following steps:

1. Click to expand the Actions drop-down menu, then click Restore to Previous Version. The Confirm Quote Restore dialog box displays.



Confirm Quote Restore Dialog Box

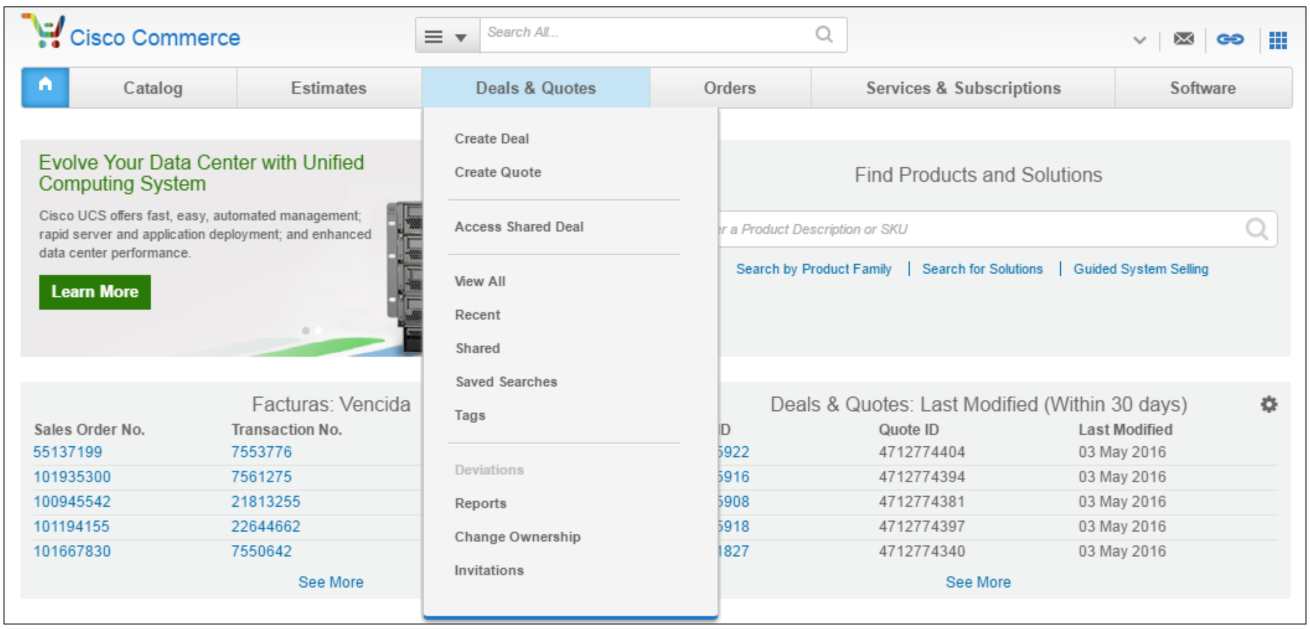
2. To discard changes and restore to the last approved quote, click **Restore Last Approved Quote**. The quote status is re-opened.
3. Resubmit for approval.
4. To continue with the edited version of the quote, click **Cancel**.

13 Managing Reports

Cisco Commerce | Deals & Quotes Header Tab | Reports

You can generate, view, and download reports under the Reports option from the Cisco Commerce Deals & Quotes drop-down menu.

From the Reports page, you can download reports when ready. You can delete any generated report; if you do not, the system will automatically remove them after a month. An e-mail alert will be sent to you when your report is completed and ready to download.

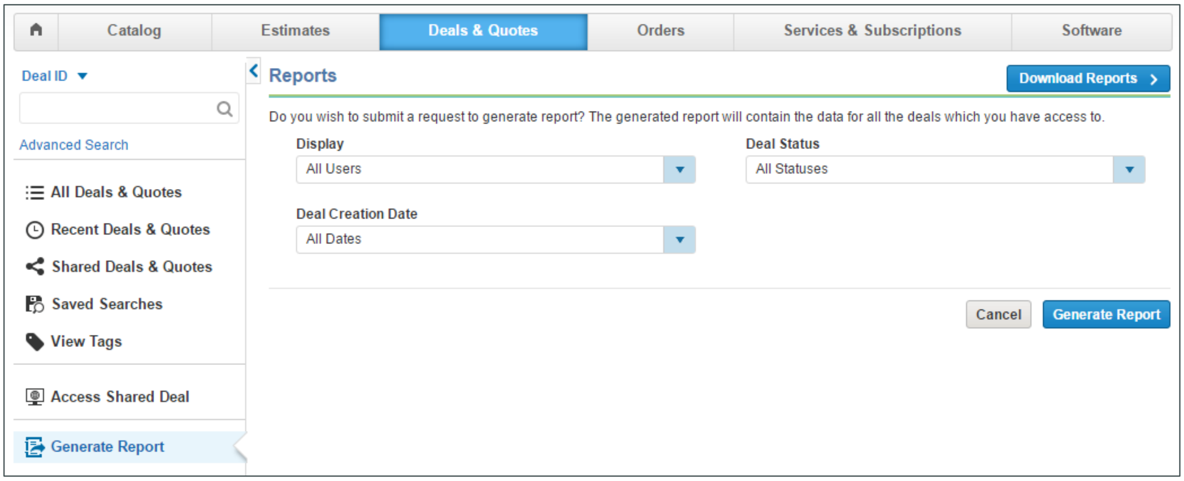


Deals & Quotes Tab: Reports Option

13.1 Generating a Report

To generate a report, complete the following steps:

1. From the Deals & Quotes records page, click **Generate Report**. The Reports page displays.



Reports page

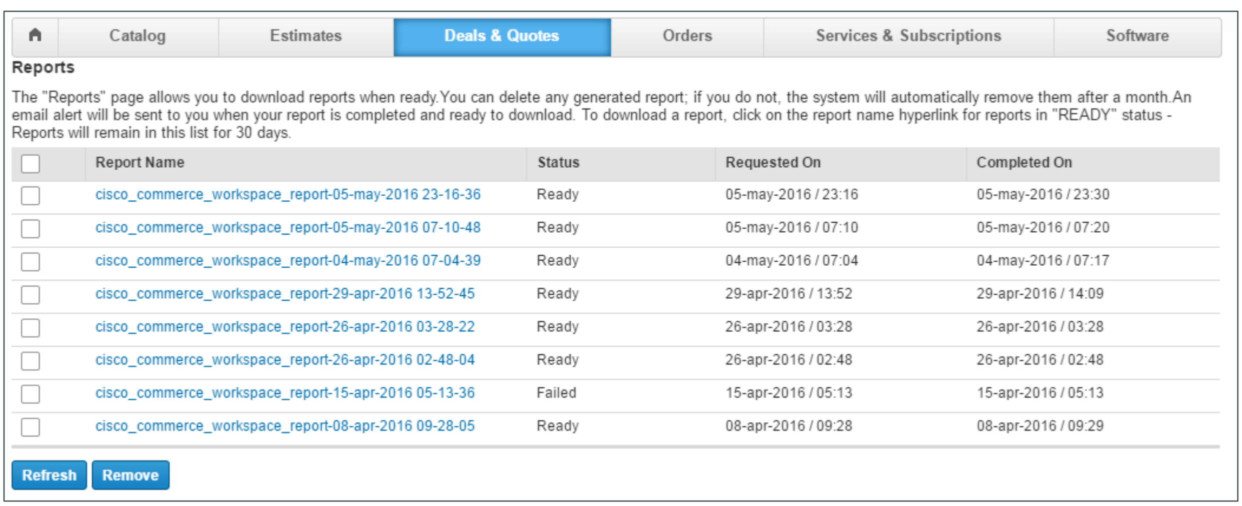
2. Filter your report generation information using the Display, Deal Creation date, and Deal Status drop-down arrows.
3. To generate the report, click **Generate Report**. A success message indicates that the report request has been submitted and that an e-mail will be sent when the report is ready to download.

13.2 Viewing and Downloading a Report

To download generated reports, click Reports from the Deals & Quotes tab. The Reports page displays with a list of reports that have been generated. Reports remain in this list for 30 days. After 30 days, the system automatically deletes reports.

Click the report name link to download and save a local copy to your machine when the status reads as “Ready”.

Additionally, to remove reports manually, make a selection and click **Remove**. The selected report will be deleted.

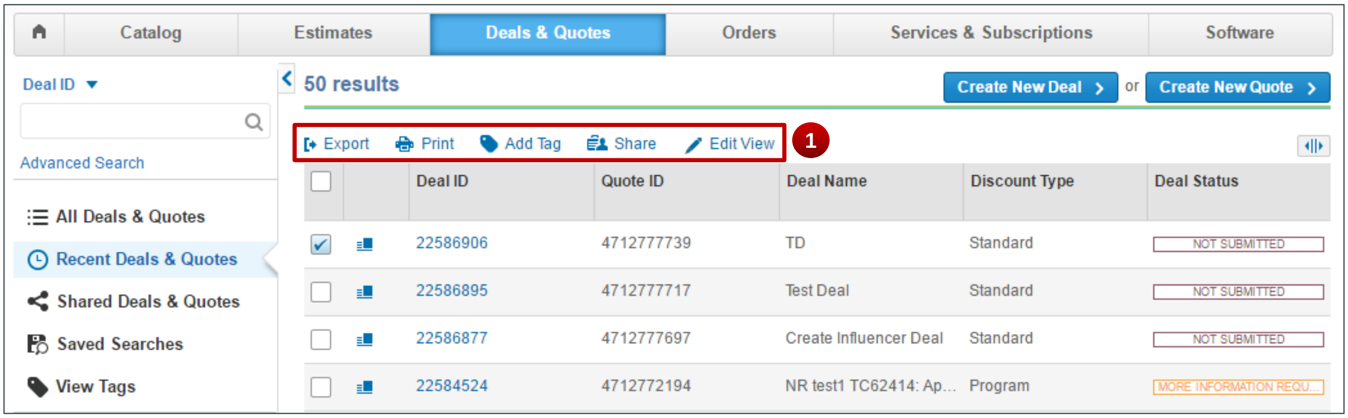


Reports Page

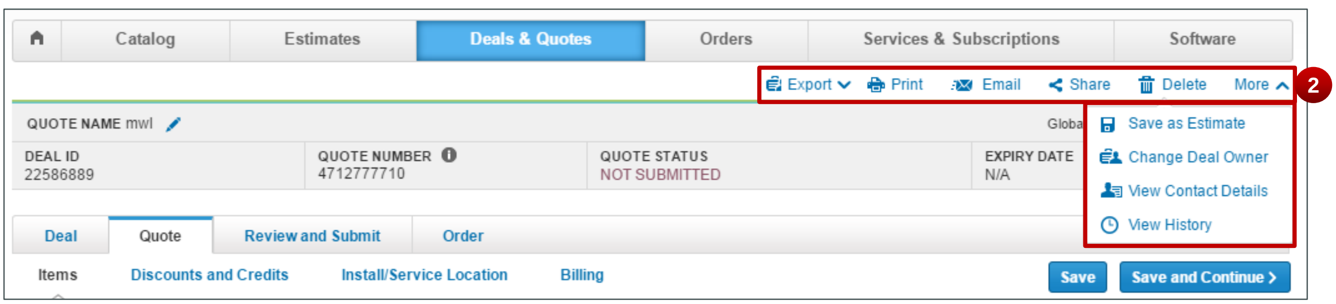
14 Using the Common Utilities

You can view, export, print, e-mail, share, delete, tag, or save as an estimate, deals or quotes order using the common utilities. You can access these utilities from:

1. The Deals & Quotes tab
2. Within a deal or a quote



Cisco Commerce: Deals & Quotes Tab



Quote Page: Common Utilities

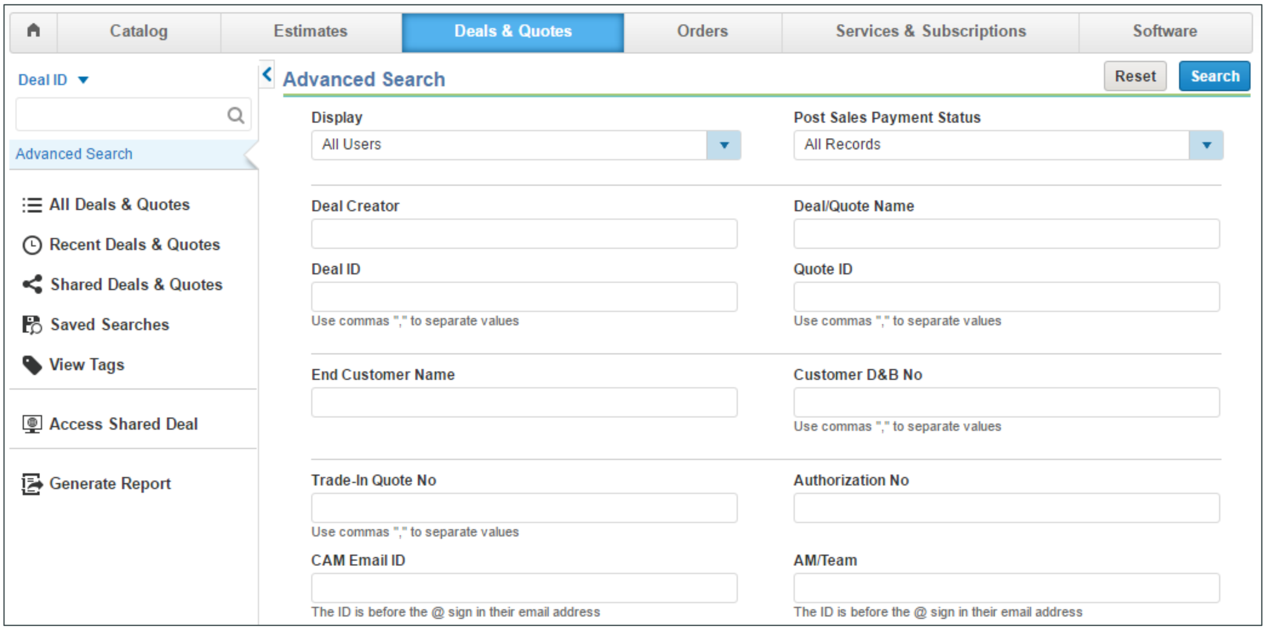
Best Practice: Use the common utilities, such as Export, Print, Share, or Tag from the Deals & Quotes tab to export, print, share, or tag multiple deals or quotes at once (see Getting Started with Cisco Commerce User Guide).

14.1 Searching for Deals and Quotes

You can search for deals and quotes using the Cisco Commerce search functionality (see Getting Started with Cisco Commerce User Guide).

Note: You can also search for your deals and quotes using Advanced Search functionality (see Getting Started with Cisco Commerce User Guide).

It allows you to search for deals and quotes with invalid configurations as well.



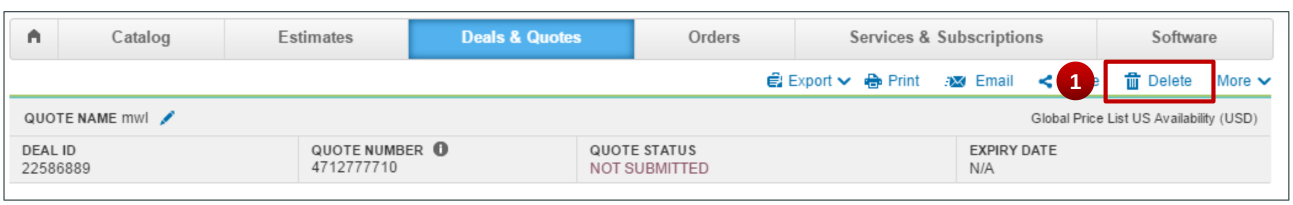
Cisco Commerce Deals & Quotes Tab: Advanced Search

14.2 Deleting a Deal or a Quote

Only unsubmitted deals and quotes can be deleted. Deleting a deal or quote permanently removes the record and all related data. Be advised that once deleted, it cannot be retrieved.

To delete a deal or a quote, complete the following steps:

1. Click **Delete**.



Quote Page: Delete

2. The Delete dialog box displays. The system displays a warning message that this will delete the quote permanently.
3. To permanently delete the deal or a quote, click **Delete**.
4. To cancel and return to the Quote Page, click **Cancel**.

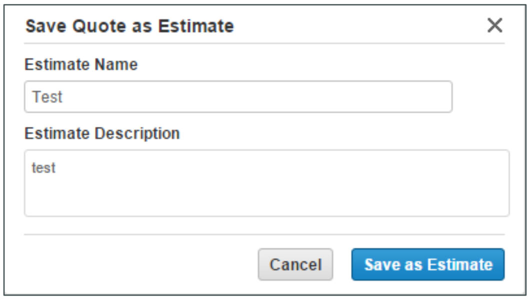
14.3 Saving a Deal or a Quote as an Estimate

When you create and configure a deal or a quote, the configuration set can be named and saved to be reused. The system will save the configuration set as an estimate and you will receive an estimate ID.

Note: The Save as Estimate icon does not display on RNSD deals and quotes.

To save the configuration set, complete the following steps:

1. From the Quote page: Items tab, click **Save as Estimate**. The Save as Estimate dialog box displays.



Save as Estimate Dialog Box

2. Click the Estimate Name field and enter the appropriate information.
3. Click the Estimate Description field and enter the appropriate information.
4. Click **Save as Estimate**. A Save as Estimate dialog box refreshes with a success message that indicates the estimate ID.

Best Practice: Make note of the estimate ID from the refreshed Save as Estimate dialog box.

5. Click **OK**. The dialog box closes.

To reuse the configuration, import a saved configuration (see Importing an Estimate).