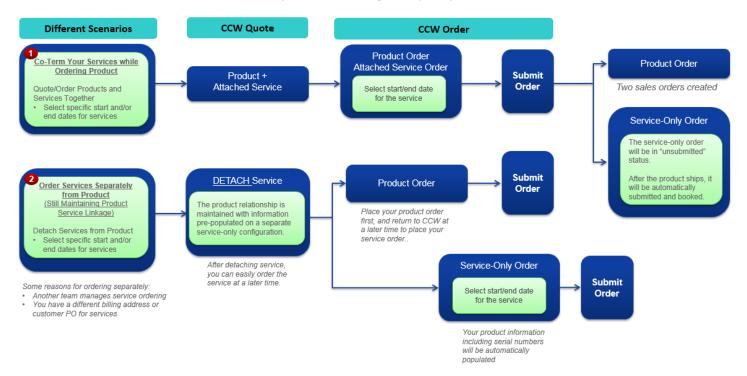
Co-Terming and Detaching Services in CCW



Overview

CCW is now your one-stop shop for Quoting and Ordering products and their attached services. You don't have to create separate Deal IDs or orders for product and services -- you'll be able keep products and attached services on the same deal ID or order. You can now:

- 1. Co-term your attached services and choose a start and end date during the ordering process.
- 2. Place product order first, and conveniently order services separately.
 - After "detaching" services, CCW will automatically maintain a separate service-only configuration (and keep track of the associated attached product), making it easy for you to order the services in the future.



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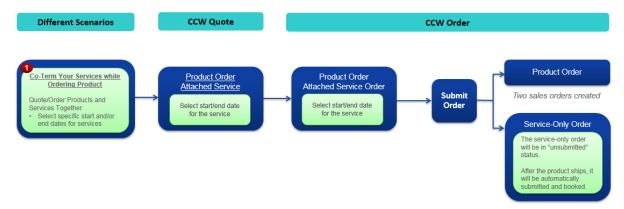
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Co-Terming Attached Services in CCW

The following section will walk you through how to co-term attached services in CCW.



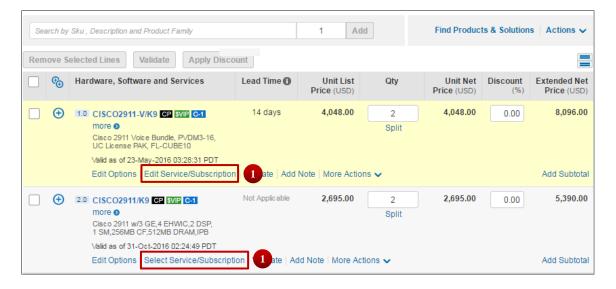
Selecting a Start/End Date for Attached Services (Estimate, Quote, Order)



To co-term your attached services, select a Start/End date while configuring your services in an Estimate, Quote, or Order.

Note: There may be slight differences in wording depending on which area (Estimate/Quote/Order) you are working in.

1. Click either Edit Service/Subscription or Select Service/Subscription.

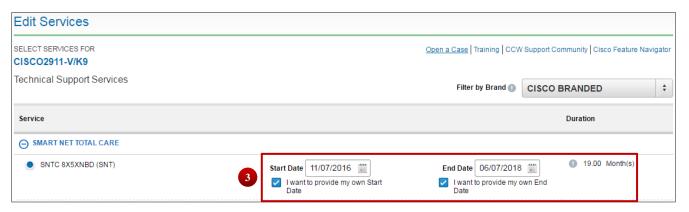




2. Click either Edit Services (as seen in the example below) or Add Service if you haven't yet selected a service.



3. Select your service, and you will be given the option to choose a Start/End Date.



4. You'll see the selected Start/End Dates on the service line.



5. Once you've completed these steps, you may continue through the normal Quote to Order process.



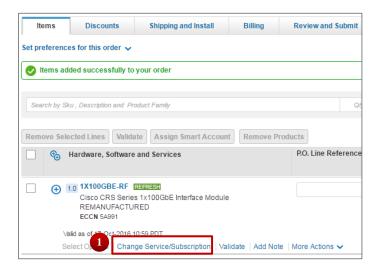
Submitting an Order for Products and Attached Services

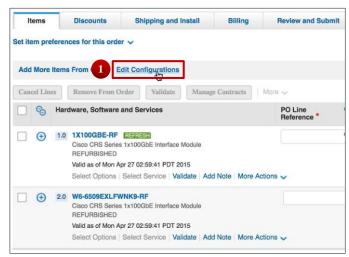


If you've selected a Start/End Date for your services in CCW Quote, your selection will carry over as part of your configuration when converting the quote into an order.

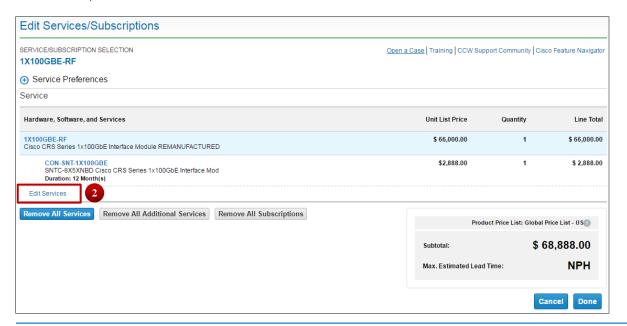
To add or edit a Start/End Date and submit an order, use the following steps.

- 1. If you're creating a standalone order, click, Change Service/Subscription
- 1. If you're converting a quote to an order, click Edit Configurations



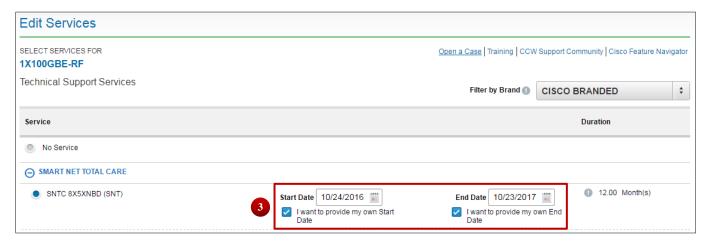


2. Click, Edit Services

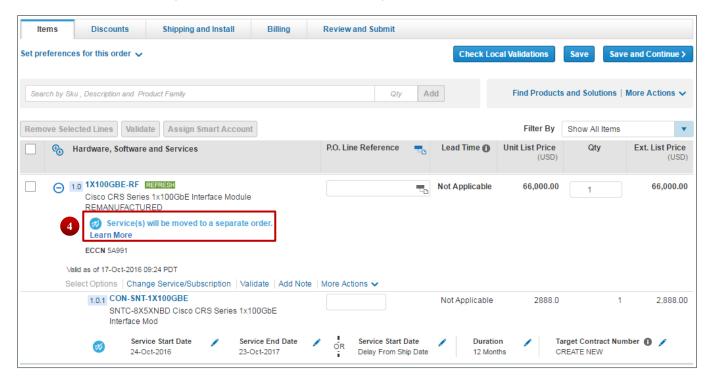




3. Select a Start/End Date.

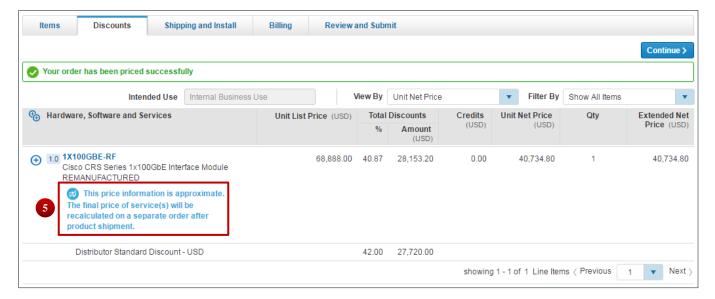


4. You'll be told that your services will be moved to a separate order.

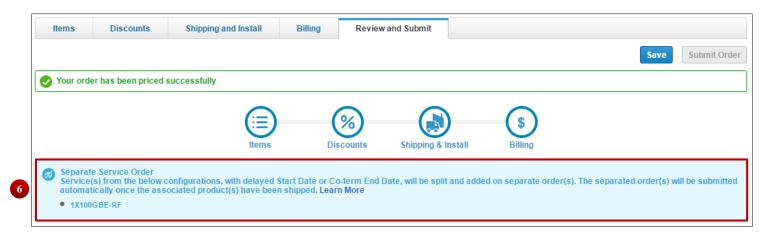




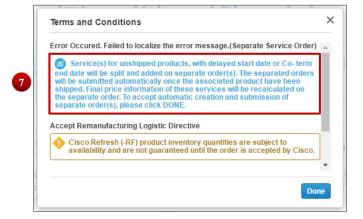
5. On the Discounts Tab, you'll be told that the pricing information is approximate, and the final price of the services will be calculated after the products have shipped.



On the Review and Submit Tab, you will see another reminder about your separate service order.



7. Click on and agree to the **Terms and Conditions**, where another reminder will appear.





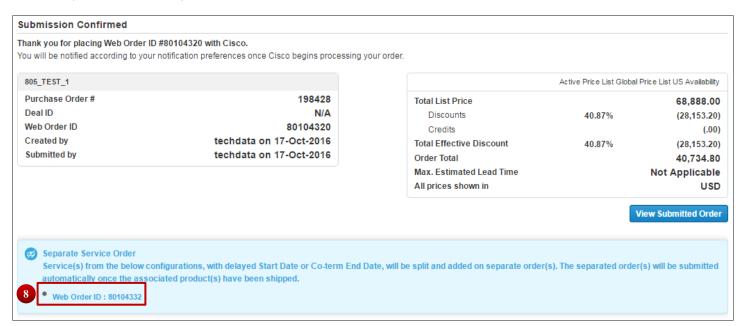


A separate service order will be created if:

- 1. Your services have a fixed duration and you choose a specific start date.
- 2. You choose to start and co-term end services on specific dates.

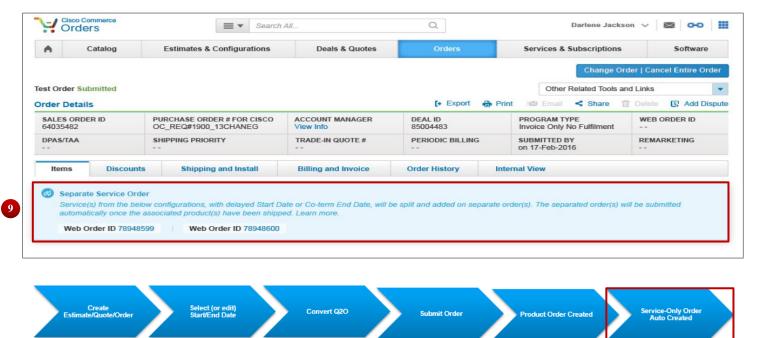
When you submit your product+attached services order, it will automatically be split into two different web and sales orders. The service-only order will remain UNSUBMITTED until after the product has shipped. Once shipped, the service-only order will be automatically submitted and booked.

8. When you submit the order, you'll see two Web Order IDs. One for the product order, and then another for the separate service-only order.



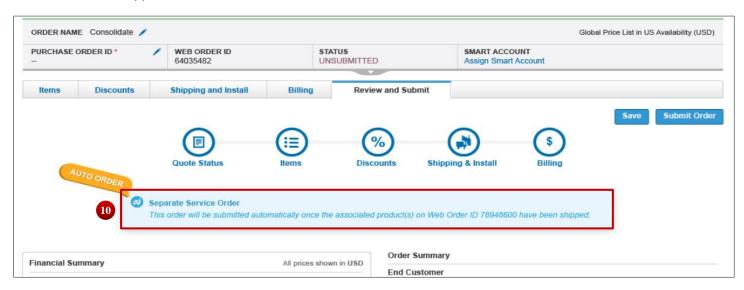


9. You will see the separate service order numbers when you check the status of the product order.



10. The separate service order will remain un-submitted, and will be automatically submitted as soon as the product has been shipped.

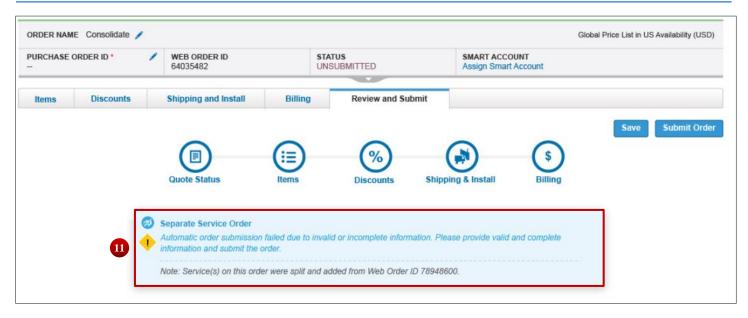
ect or edit start/end dates



- 11. If for any reason the separate service order fails to automatically submit, you will be able to manually resubmit the order yourself in CCW.
 - If the product ships after the selected start date, you're order will not auto-submit. You will be able to manually change the start date if this occurs.

quote/order as needed

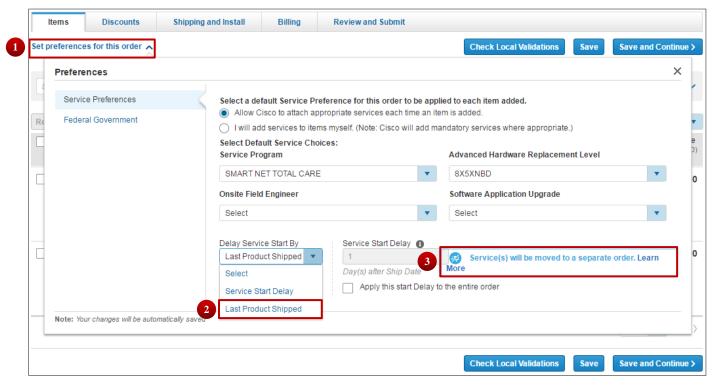




Update Preferences to Start Services after All Products Have Shipped

If you'd like to start your services after all the products on your order have shipped, use the following steps.

- 1. From the Items Tab, click **Set Preferences for this order**.
- 2. Select Last Product Shipped.
- 3. A separate order notification will appear.

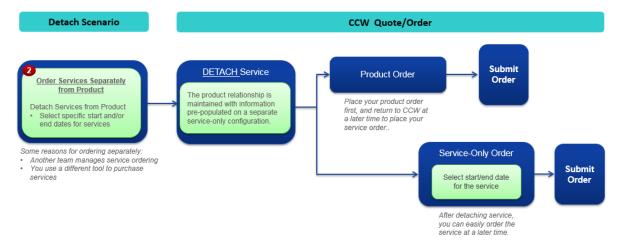


Note: Refer to the <u>Submit Order for Products and Attached Services</u> section (Step 4 and on) for further details on completing the ordering process for your products and attached services.



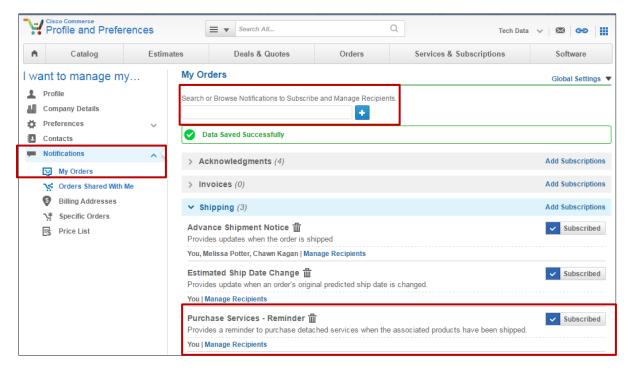
Detaching Services in CCW

The following section will walk you through how to detach services in CCW Quote and Order. However, prior to detaching services be sure to update your Service Preferences and subscribe to the **Purchase Services Reminder**.



Subscribe to Purchase Services Reminder

CCW will provide you with a reminder to purchase your detached services once the product has been shipped. To subscribe to these email notifications, go to **My Profile and Preferences – Notifications –** and search **Purchase Services – Reminder**. Click the addition button next to the search field to **Subscribe to the Purchase Services Reminder**.



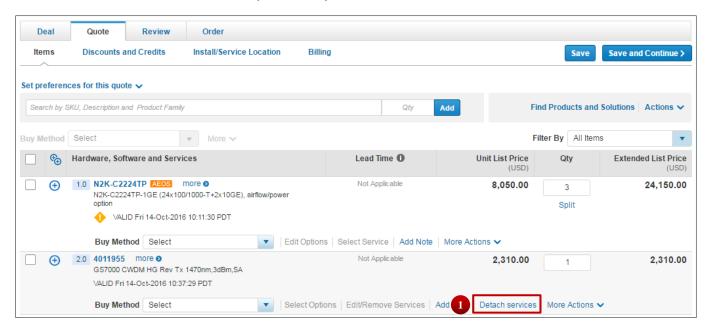


Detach Services during Quote Creation

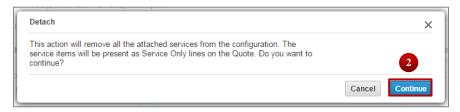


You can detach a service at the line level for an individual product, or you can detach all services from the entire quote at once. To detach a service at the line level:

1. Click on Detach Services on the specific line you'd like to edit.



2. A popup will appear, click Continue. (Cut it out)



3. A new major line will appear at the bottom of the page, with the product greyed out and price displayed as 'Not Applicable'.

Note: Expand the major line and you will see the service only configuration appear as a minor line. The Unit List Price and Extended List Price are now available to view for the service. (Show Product and Service Order)

Buy Method Select

Items Per Page

2.0.1 CON-RFR-4011955

TX 1470,ANL SCA Duration: 12.00 Months Change Duration

RETURN FOR REPAIR SV= TOP,1G CWDM HI GAIN

78.00

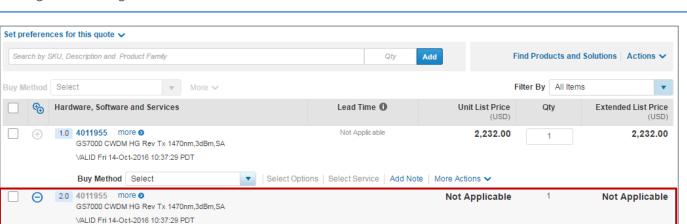
Next > >>

2,310.00 Not Applicable

•

All prices shown in USD

Save and Continue >



| Select Options | Edit/Remove Services | Add Note | More Actions >

78.00

Results 2 of 2 ((\langle Previous | 1

Financial Summary

Total List Price

Total Lead Time

Not Applicable

50

View

4. After the quote is approved, you can order the product only configuration and come back at a later time to order the service only configuration.

Detach Services and Create Product Order

The following section will walk you through how to detach services in CCW Order.

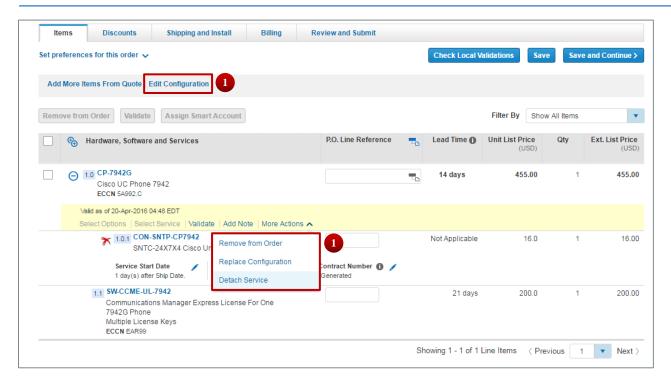


Create a Quote converted Order using the Deal ID from your Quote containing Products and Services. See <u>Cisco</u>
<u>Commerce Order Quick Reference Guide</u> for help on creating an Order. From the order you can detach the services and submit the order with only products. The detached services will be reflected on the quote as a separate service-only line (reflecting the product information from the order) and you'll be able to covert these services to an order at a later date.

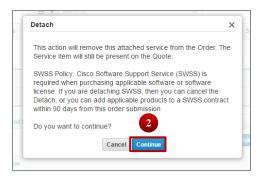
1. From the Items tab, select More Actions and Detach Service to remove the service(s) from this product line.

Note: Detach Services is available for Distributor Contractual Orders (additional service discounts will be claimed through DART) so long as the configuration has not been edited (<u>Edit Configuration</u> has not been clicked). For other order types there is no restriction after editing configurations.





2. Click Continue.

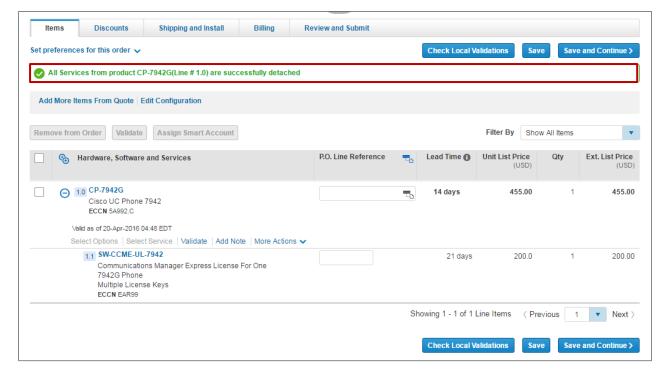


- 3. The Service(s) are removed from the product.
- 4. You'll be told if you can't detach the services.





5. Click Save and Continue and complete the Ordering process. See Cisco Commerce Order Quick Reference Guide for more information.



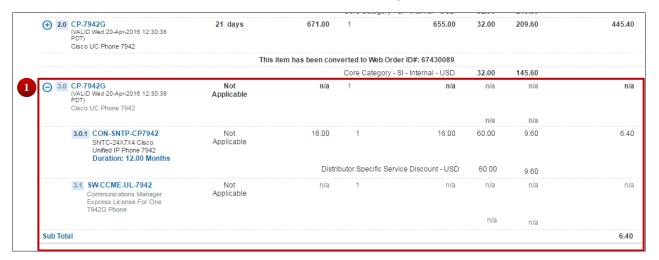
View Quote Containing Detached Services (optional)

From the Discounts and Credits tab of the original quote, you'll see the detached service has been added as a new line.

You can search for all deals with Detached Services in Deals & Quotes Advanced Search

1. All components of the original 2.0 line are visible on the 3.0 line. You'll see that they are greyed out and do not have any associated cost.

Note: Cost and Discount levels will be the same as on the original Quote and Order.



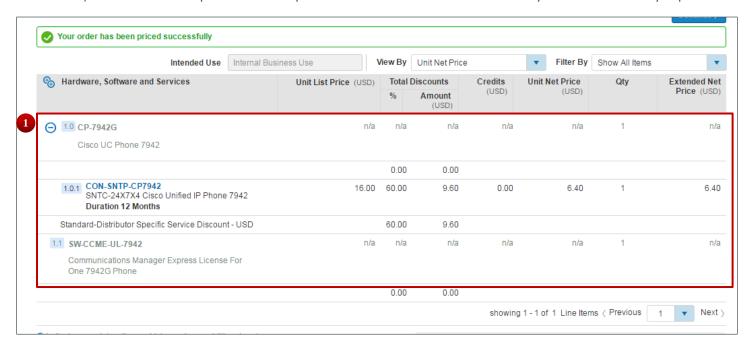


Order the Detached Services

You can easily order the detached services from the Quote the same way you convert any other line from a Quote to an Order. See Cisco Commerce Order Quick Reference Guide for more information.

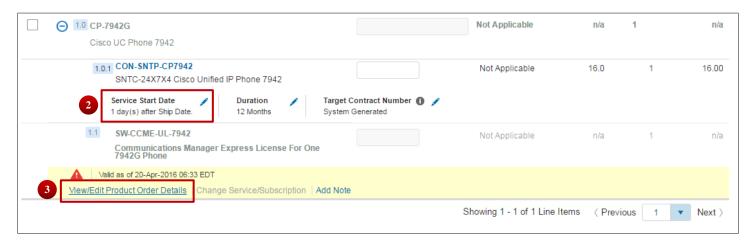


1. This service-only order will have the detached service, and you'll be able to see the attached product (greyed out). You can now complete the Order process with all Product information for your services already captured.



- 2. Select Service Start Date. Start and End Dates will be editable if the product has already shipped, otherwise you may select a flexible service start delay if the service is eligible.
- 3. All associated shipped product will be automatically captured, you will not have to enter any serial numbers or order information.
 - If your Order is missing a valid serial number (or Sales Order for non-serialized products) or you would like to edit, select <u>View/Edit Product Order Details</u> to manually input the product information.

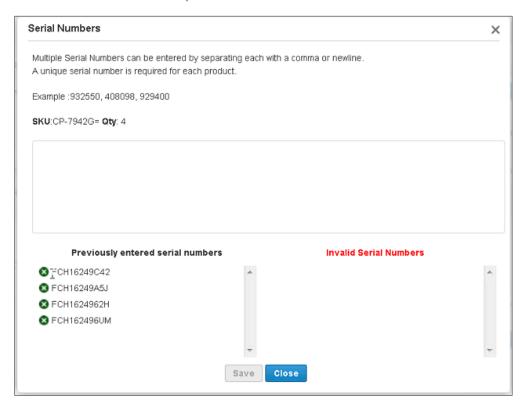




4. Enter the Serial Number or Sales Order Number from your product order.



5. If multiple serial numbers are captured, you can edit them here. Click the green x's to remove and add additional serial numbers as required.



6. Complete your Order. See <u>Cisco Commerce Order Quick Reference Guide</u> for more information.



Reporting for Quotes with Detached Services

You can generate a report to identify which remaining Quotes have 'Detached Services' within them. Choose your preferred dates and statuses from the dropdown menus after selecting **Quotes with Detached Services**.

