



Cisco Commerce



Deals and Quotes

User Guide

Cisco Proprietary

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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

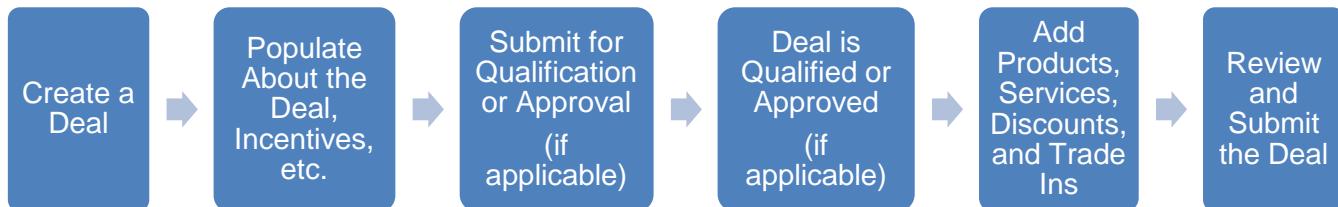
To understand how the deals and quotes functionality fits within Cisco Commerce and the Cisco sales structure, see the [Getting Started with Cisco Commerce User Guide](#).

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.

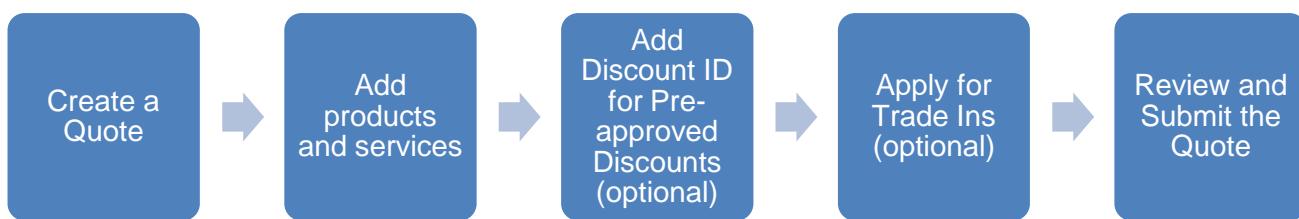


Deals Workflow



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

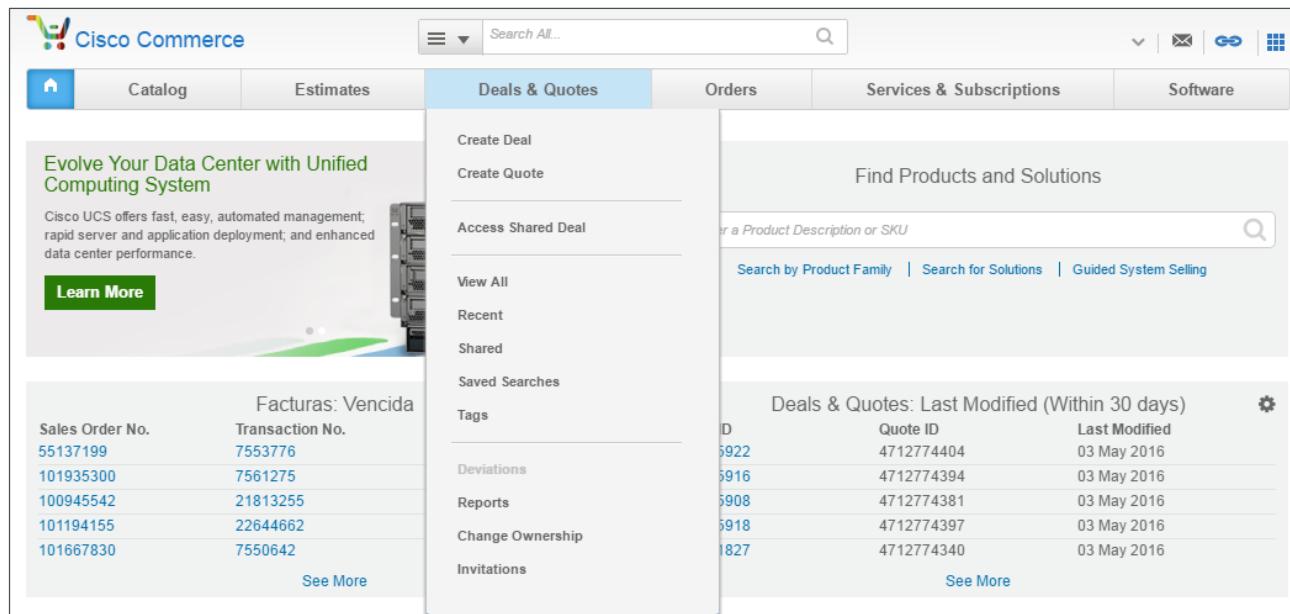


Note: Despite this distinction, you can create deals with or without incentives and, incentives may or may not require qualification.

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



ID	Quote ID	Last Modified
5922	4712774404	03 May 2016
5916	4712774394	03 May 2016
5908	4712774381	03 May 2016
5918	4712774397	03 May 2016
1827	4712774340	03 May 2016

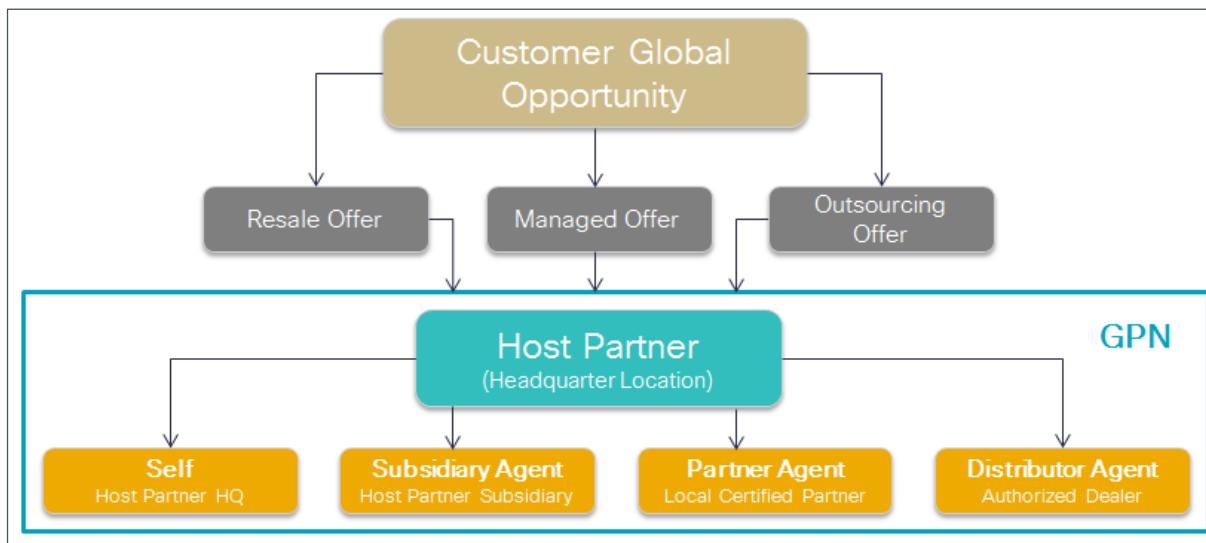
Options on the Deals & Quotes Tab

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.

The screenshot shows the 'Create a Deal' page in the Cisco Commerce Deals & Quotes section. At the top, there's a note about global deals involving multiple countries or partner types, with a link to a training guide. Below that, a note says 'If you are not creating a Global Deal, simply click the "Create Deal" button to continue. (Note: Not applicable for Outsourcing deals)'. A red circle labeled '3' points to the 'Check this box to create and register a Global Deal' checkbox, which is checked. Another checkbox for 'Create a Local Component of your Global Deal' is also present. The 'Deal Name' field is empty. At the bottom, there are fields for 'Cisco Channel Account Manager (CAM)*', 'Cisco Account Manager (AM)', and 'Buying on behalf of'.

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](#).

QUOTE NAME testdeal

DEAL ID 21931979	QUOTE NUMBER 4712101256	QUOTE STATUS Not Submitted	Incentive(s) Status	EXPIRY DATE N/A
---------------------	----------------------------	-------------------------------	---------------------	--------------------

Global Price List US Availability (USD)

Deal Quote Review and Submit Order

Who's involved About the Deal Incentives Questionnaire

Save **Save and Continue >**

* Required Field

Deals and Quotes Page

3.1 Populating Who's Involved

Cisco Commerce

Deals & Quotes Tab

Create Deal

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.

Cisco Channel Account Manager (CAM)*

Select CAM

Find your CAM with the CAM Locator

Cisco Account Manager (AM)

TO BE ASSIGNED BY CISCO

Buying on behalf of

Please Select

CONTACT & ADDRESSES

End Customer*

+ Select an End Customer

English | Chinese | Japanese | Korean

NEW Faster Search (English Only)

First Name Last Name

Title

Phone Number

Email Address

Company Website

Create Deal

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

CONTACT & ADDRESSES

End Customer *	View Partner Profile 1
Partner *	SYSTEMS, INC 12980 FOSTER ST UNITED STATES

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

Cisco.com ID	SYSTEMS, INC
Purchasing Relationship DIRECT	12980 FOSTER ST
Certifications Gold Certification Application	UNITED STATES
Job Title Purchasing/Procurement	Maria
Company SYSTEMS, INC	
Authorizations Specializations	maria.
Cisco Deal Administrators	
Cisco Channel Account Managers	
The information seen here can be changed using the Partner Self-Service 3	

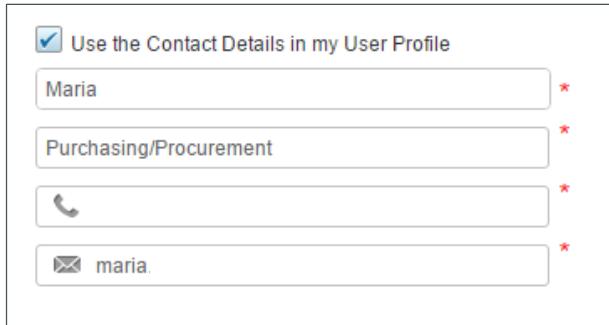
Partner Profile Dialog Box

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.



Use the Contact Details in my User Profile
Maria
Purchasing/Procurement
Phone number
maria

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*
+ Select an End Customer
English | Chinese | Japanese | Korean
NEW Faster Search (English Only)

End Customer Section

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

Select End Customer Address

New Search not meeting your needs? [Revert to previous Customer Search](#)

Search for End Customer Name and/or Address

Search Tip Provide more information to narrow search results

[More Search Tips](#)

Search by Company Name, Address, and/or Country

Recently Used Addresses

Cancel Reset

Faster Search Dialog Box

To add an end customer, complete the following steps:

- 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.
- 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 for End Customer

Search Address Fields ⓘ

Customer Company Name *

Country *

UNITED STATES

State/Province: *

City * Zip/Postal Code

Office Type

Head Office Branch Office Single Location

IMPORTANT: If you cannot find the customer you are looking for following a search, please contact your Cisco account team for correct customer details. AS A LAST OPTION ONLY, you will be able to create a new end customer, however this will delay the deal approval process.

Cancel Reset **Search**

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.

Company	Address	City	State/Province	Zip/Postal Code	Country	Cisco Sales Person/Team Identified?	HQ / Branch
<input checked="" type="radio"/> Wa	STORE07	LOWELL	AR	72745	US		
<input type="radio"/> G	6120 ST	FREMONT	CA	94538	US		Branch
<input type="radio"/> CI	300 E	SAN JOSE	CA	95134	US		Branch
<input type="radio"/> G	123	THORNTON	CO	80241	US		Head Quarter
<input type="radio"/> G	6255 BOAT	ATLANTA	GA	30336	US		
<input type="radio"/> ACC	3700 WAKE	RALEIGH	NC	27609	US		Branch

Results 1 - 25 of 374 < 1 >

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

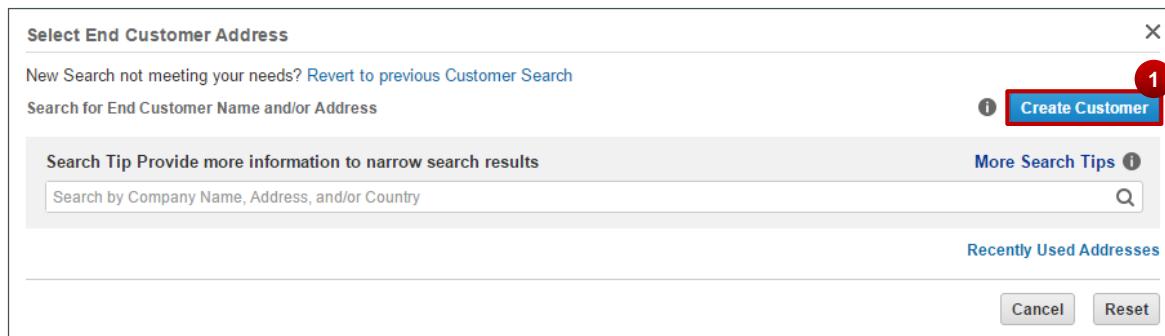
If the search for a customer address does not return the desired results, you can create a new customer address.



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 Customer

Create a New Address in the Cisco Directory

Customer Company Name *

Country * UNITED STATES

State Select

City * **Zip/Postal Code ***

Address 1 *

Address 2

Address 3

Address 4

IMPORTANT: Creation of new End Customer may take some time in registration which may delay the approval process.

Go Back to Search Reset Create Customer

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**.

Create Customer

Confirm New Customer
We have suggested alternative customer name and/or address.
Would you like to use these new information, or continue with your original information?
You Entered:

Address: 1600 parkway
UNITED STATES

Use my original information
Recommended Information:

Address: 1600 PKWY
UNITED STATES

Use this alternative information

4

Back Use Selected Address

IMPORTANT: Creation of new End Customer may take some time in registration which may delay the approval process.

Select End Customer Address

3.1.2.2 Selecting a Different End Customer

The screenshot shows the 'End Customer' section of a form. It includes fields for 'Address' (1600 PKWY, US) and 'Language'. A dropdown menu for 'Language' is open, showing options: English, Chinese, Japanese, Korean, and a red-highlighted 'NEW' option. Below the dropdown is a link 'Faster Search (English Only)'.

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.

The screenshot shows the 'End Customer Profile' dialog box. It displays the 'Customer Company Profile' (Most Recent Version Known at Cisco) with the address '1600 PKWY, US'. Below the address, there are sections for 'D&B Number', 'Vertical Market: Unknown', and 'Employee Count'.

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.

<i>First Name</i>	<i>Last Name</i>	*
<i>Title</i>		*
<i>Phone Number</i>		*
<i>Email Address</i>		*
<i>Company Website</i>		*

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 Channel Account Manager (CAM)*	Cisco Account Manager (AM)
Select CAM	AM TEAM
Find your CAM with the CAM Locator.	View Members 5

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

Cisco Commerce

Deals & Quotes Tab

Create Deal

Deals and Quotes Page

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.

View History

Select two versions and click "Compare Selected Versions" to view changes.

Date and Time	User	Activity
21-Jan-2016 04:47 PM	Emily	Quote Re-open
21-Jan-2016 03:24 PM	SYSTEM	Approved , Expiration Date : 20-Apr-2016

Filter By: All Items

Cancel | Compare Selected Versions

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.

View Contact Details

Cisco CAM Glenns	Cisco AM Travis	Created By Emily on 21-Jan-2016
End Customer INC 6120 AVE CA 94538 US	Partner SYSTEMS, INC 12980 ST STE 300 PARK KS 66213 UNITED STATES	

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

Cisco Commerce

Deals & Quotes Tab

Create Deal

About the Deal Sub-Tab

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.

The screenshot shows the 'Deal' tab selected in the top navigation bar. Below it, the 'About the Deal' sub-tab is active. The form contains several input fields and dropdown menus:

- Deal Description:** A large text area for entering a deal description.
- Price List:** A dropdown menu set to "Global Price List US Availability". A note above it states: "Incentives are linked to this field * Required Field".
- Expected Closing Date:** A date picker calendar.
- Intended Use:** A dropdown menu set to "Internal Business Use".
- Deal Category:** A dropdown menu set to "Please Select".
- Deal Source:** A dropdown menu set to "Get Refreshed".
- Deal Type:** A dropdown menu set to "Purchase".
- Probability of Closing:** A dropdown menu set to "25% - Low".
- Expected Cisco Hardware and Software List Amount:** A text input field with a value of "0.00".
- Expected Cisco Service List Amount:** A text input field with a value of "0.00".
- Total Expected Amount:** A text input field with a value of "0.00".
- Note:** "User currency dictated by promotion rules and country policy" and "Currency Converter".

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](#).

Competitors	
<input type="checkbox"/> Competitor Name	Technology Name
+ Add	
Delete	
Save Save and Continue >	

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?](#).

Intended Use *

Deal Category *

Managed Service Contractual Provider *

ALEXANDER OPEN SYSTEMS, INC, USA

1 [+ Change Provider](#)

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	MS Partner Name
<input checked="" type="radio"/>	SYSTEMS, INC

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:

- From the Deal tab: Incentives sub-tab, scroll down to view the available incentives.
- 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.

Based on your profile and the answers you provided, the deal may be eligible for the following incentives.
Please select the incentives requested for this deal.

Hunting	
<input checked="" type="checkbox"/> Net New Business (US OIP)	<input type="checkbox"/> Net New Business (Architecture Reward)
<hr/>	
Hunting Plus	
<input type="checkbox"/> New Account Acquisition (New Account Breakaway-Nexus -- US)	
Hunting Plus	
<input type="checkbox"/> New Account Acquisition (New Account Breakaway - UCS -- US)	
Hunting Plus	
<input type="checkbox"/> New Account Acquisition (New Account Breakaway - Wireless -- US)	
Hunting Plus	
<input type="checkbox"/> Security Ignite Competitive and Refresh Incentives (ASA Competitive and Firewall Refresh-H-US)	
Hunting Plus	
<input type="checkbox"/> Security Ignite Competitive and Refresh Incentives (Email Security Competitive Refresh Program-H-US)	

Quoting QA Bundle

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.

- 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.

The screenshot shows the 'Deal' tab selected in the top navigation bar. Under the 'Incentives' tab, the 'Hunting' section is expanded, showing fields for Track (Net New Business), Program (OIP Americas), Reward Code (BR), Reward Name (US OIP), and Try and Buy Eligible (Yes). A note below states: 'By submitting a new deal registration, you are confirming the accuracy of the information provided, that you are authorized to bind your company to the Terms and Conditions of the selected program, and that you do so bind your company.' It also links to the US OIP website for policies. At the bottom, a question asks if an RFP/RFQ/RFI has been issued, with 'YES' checked and a red exclamation mark icon.

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%.

Technology Name	% of Technology Mix
CLOUD AND VIRTUALIZATION	50
COLLABORATION-Conferencing	50

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.

Product Families

Discounts displayed here are only indicative discounts for Product Families selected. Accelerators, Promotions and SKU level specific Discounts have not been considered. For final Discount, please upload a SKU level BOM in the Quote tab.

<input type="checkbox"/> Family Name	Expected Buy Method(s) *	Expected List Amount *	Discount %
<input type="checkbox"/> Cisco R Series Racks	Choose one of the options	100000	--
<input style="border-radius: 50%; width: 30px; height: 30px; margin-bottom: 5px;" type="button" value="8"/> + Add Product Families			

Enter Part Number or item Description (i)

Apply Selection

Cisco Information Center Products - CIC
 Cisco R Series Racks
 Cisco CVA120 Series Products
 Cisco DCM MPEG Processor Series

Active Price List: Global Price List US Availability
 Product Families Total 100000

Save Save and Continue >

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 EMEA 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.

The screenshot shows the 'Quote' tab of the Cisco Deals and Quotes interface. At the top, there are tabs: Deal, Quote (which is selected), Review and Submit, and Order. A 'Save and Continue' button is located in the top right corner. Below the tabs, there is a section for 'Buy Method' with a dropdown menu set to 'Select'. To the right, a 'Billing Address' section is shown with a table containing the following data:

SYSTEMS	
Billing ID	401
Address	ENGLEWOOD, CO US
Operating Unit	CISCO US OPERATING UNIT

A note indicates that this is a required field. Below the buy method section, there are two sets of address selection fields. The first set is for 'Install Site' with a dropdown set to 'UNITED STATES' and a link to 'Add a Full Install Site'. The second set is for 'Service Location' with a dropdown set to 'UNITED STATES' and a link to 'Add a Full Service Location'. Both sets include a note stating they will be default for new items.

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	<p>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.</p> <p>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)).</p>
Buy Method	<p>From the Buy Method drop-down menu, select the appropriate option.</p> <p>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.</p>

Section	Action
Install Site Information	<p>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.</p> <p>If applicable, click the Country drop-down arrow and click the appropriate country.</p> <p>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.</p>
Service Location Information	<p>Specify the Service Location country if you are transacting SaaS Subscriptions. By default, the Service Location country will be the end customer country.</p> <p>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.</p>

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.

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

Deals & Quotes Tab: Invitations

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

	Invitation Name	Invitation Status	End Customer Name	AM Email ID	Next Action
<input type="checkbox"/>	Test_Invite-	ACTIVE	PLAZA		Create Deal 2
<input type="checkbox"/>	invitation	USED	PLAZA		--
<input type="checkbox"/>	Test- Clone #1	ACTIVE	PLAZA		Create Deal
<input type="checkbox"/>	Test	USED	PLAZA		--

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.

- 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:

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

The screenshot shows the 'Quote' tab selected in the top navigation bar. Below it, the 'Items' sub-tab is active. On the right side of the screen, there is a search bar with the placeholder 'Search by SKU, Description and Product Family'. To the right of the search bar are buttons for 'Qty', 'Add', and 'Find Products and Solutions'. The 'Find Products and Solutions' button is highlighted with a red box and a red circle containing the number '1'.

Quote Tab: Items Sub-Tab – Find Products

- Click the Product description or SKU radio button.

The screenshot shows the 'Find Products & Solutions' page. At the top, there are two tabs: 'Search and Add' (selected) and 'Lead Time Search'. Below the tabs, there is a 'Search by' section with three radio buttons: 'Product Description or SKU' (selected), 'Product Family', and 'Solution'. There is also a checkbox for 'Display VIP eligible product only'. In the center, there is a search input field with the placeholder 'Enter Product Description or SKU'. To the right of the input field is a 'Search' button. A red box surrounds the input field, and a red circle with the number '3' is placed to the right of the 'Search' button.

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

- 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.
- Locate the appropriate product(s).
- 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](#)).

- Repeat steps 3 - 5 to populate the items in the deal.
- To remove unwanted items from the Selected Items cart, click Remove.
- 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).

Results for "2911" — 53 Results Found				Key
SKU	Lead Time	Unit List Price (USD)	Qty	
Cisco 2900 Series Integrated Services Router				
C1-CISCO2911/K9 C CP SVIP	14 days	2,695.00	5 1 +	
Cisco ONE - ISR 2911				
C2911-AX/K9 C SVIP C-1	14 days	4,300.00	1 +	
Cisco 2911 AX Bundle w/ App,SEC Lic				
C2911-AX/K9-RF C CP REFRESH	--	2,580.00	1 + 7	
Cisco 2911 AX Bundle w/ App,SEC Lic REMANUFACTURED				
CISCO2911-DC/K9 C CP	14 days	3,245.00	1 +	
Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,256MB CF,512MB DRAM+DC				

Selected Items

Item	Qty
CISCO2911/K9 C CP SVIP C-1	1
Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,256MB CF,512MB DRAM,IPB Remove	
CISCO2911-DC/K9 C CP	1
Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,256MB CF,512MB DRAM+DC Remove	

8 Add

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:

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

Find Products & Solutions

2 4

Search and Add	Lead Time Search	Back to [Page Accessed From]
Search by 3		
<input type="radio"/> Product Description or SKU	<input checked="" type="radio"/> Product Family	<input type="radio"/> Solution
<input type="checkbox"/> Display VIP eligible product only		Global Price List - US (USD) 1
Product Family		
<input type="text" value="24x7x4OS Trblshlld 24X7X4OS (CON-OPTLD-XXX)"/>	5 Search	
3PCOE MATERIAL		
ADVANCED SERVICES FIXED PRICE		
ADVANCED SERVICES SUBSCRIPTION SERVICES		
ADVANCED SERVICES TRANSACTION SERVICES		
APIC		

Find Products & Solutions Page: Search By – Product Family

- Click **Search**. Results display all applicable product families.
- Locate the appropriate product(s).
- 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](#)).

- Repeat steps 3–7 to populate the items in the deal.
- 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:

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

Find Products & Solutions

Search and Add		Lead Time Search	Global Price List - US (USD)	
Search by		<input type="radio"/> Product Description or SKU <input type="radio"/> Product Family <input checked="" type="radio"/> Solution		
Search By Solution Identifier		Enter Solution Identifier/Name	View Components	3 View All Solutions
Main Category	Sub Category			Solution ID *
Data Center Solutions	Digital Ceiling			<input checked="" type="radio"/> StadiumVision
Digital Capabilities	Manufacturing			
GSP	Oil and Gas			
IT Solutions	Sports & Entertainment			
MainCat+Test1	Transportation			
Service Provider	Utilities			
Vertical Solutions	Others			
testcat				
Cancel 6 View Components				

Find Products & Solutions Page: Search By – Solution

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

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

Results for "StadiumVision" — 53 Results Found				
SKU	Lead Time	Unit List Price (USD)	Qty	
SVISION Scaling Licensing	0 days		<input type="button" value="1"/> <input type="button" value="+"/>	Add Category
SV-DIR-REMOTE-K9 PC-S C	0 days		<input type="button" value="1"/> <input type="button" value="+"/>	Add Category
StadiumVision Director Remote Software and License				
SVISION Solutions				Add Category
SV-DMP-4K-PWR=	21 days	99.00	<input type="button" value="1"/> <input type="button" value="+"/>	Add Category
StadiumVision Director 4K DMP Spare Power Supply World				
SV-DMP-4K-ROW-K9	21 days	1,995.00	<input type="button" value="1"/> <input type="button" value="+"/>	Add Category
StadiumVision Director 4K DMP PoE+ Required, RoW				
R-SV-DR-DIR-SW-K9 PC-S C	0 days		<input type="button" value="1"/> <input type="button" value="+"/>	Add Category
StadiumVision Director Software Only License				
SV-DMP-4K-NA-K9	21 days	1,995.00	<input type="button" value="1"/> <input type="button" value="+"/>	Add Category
StadiumVision Director 4K DMP PoE+ Required, NA				
SVISION Spares and Expansion				Add Category

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.

SKU	Description	Product Family	List Price (USD)
CISCO2911-V/K9	Cisco 2911 Voice Bundle, PVDM3-16, UC License PAK, FL-CUBE10	China Collaboration Breakaway Plus Four	3595.0
CISCO2911/K9	Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,256MB CF,512MB DRAM,IPS	Cisco 2900 Series Integrated Services Routers	2695.0
CISCO2911-HSEC+/K9	VPN ISM module HSEC bundles for 2911 ISR platform	Cisco 2900 Series Integrated Services Routers	7645.0

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	<p>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.</p> <p>See Importing an Estimate.</p>
Copy Existing Quote BOM	<p>Import the Bill of Materials from a quote previously created in Cisco Commerce to help you quickly build a validated solution.</p> <p>See Copy Existing Quote BOM.</p>
BOM Upload	<p>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.</p> <p>See Uploading a BOM.</p>

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.

QUOTE NAME test Quote				Global Price List in US Availability (USD)
DEAL ID 21931533	QUOTE NUMBER 4712100627	QUOTE STATUS Not Submitted	EXPIRY DATE NA	
Import Estimate				
i Import Estimate will import Part Number, Quantity and Duration for items from the original Estimate.				
Start by searching for an estimate you would like to copy.				
Estimate ID	Estimate Name	Created By		
<input type="text"/>	<input type="text"/>	<input type="text"/> Created By Me		
Created Date	Last Modified	Status		
<input type="text"/> All Dates	<input type="text"/> All Dates	<input type="text"/> 3 selected		
<input type="button" value="Cancel"/> <input type="button" value="Reset"/> <input type="button" value="Search"/>				

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.

Deal	Quote	Review and Submit	Order
! Copy Quote will import Part Number, Quantity and Duration for items from the Hardware, Software and Services section of the original Quote.			
Search Start by searching for a quote you would like to copy using one or both of the following options			
Choose Category: <input type="text"/> Deal/Quote Name	Choose a Date Range <input type="text"/> From: To:	<input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Cancel"/>	

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.

Deal	Quote	Review and Submit	Order
<div style="border: 1px solid red; padding: 5px; margin-bottom: 5px;"> ⚠ Lines will be priced individually and added as separate lines if they cannot be added as configurations. This may take slightly longer because of the number of lines present in the file. View estimated average wait times. </div> <div style="border: 1px solid #ccc; padding: 5px; background-color: #f2f2f2;"> Search Only part number, quantity and duration are uploaded from Excel BOM files. </div> <div style="border: 1px solid #ccc; padding: 5px; background-color: #f2f2f2; margin-top: 10px;"> Select File: <input type="file"/> Choose File </div> <div style="border: 1px solid #ccc; padding: 5px; background-color: #f2f2f2; margin-top: 10px;"> <input checked="" type="checkbox"/> Import Lines as assembled configurations (Unchecking this will import all your items as major lines). Click here for more information. <input checked="" type="checkbox"/> Items Uploaded are part of the Solution Search a Solution ▾ </div>			
Cancel Clear Upload File			

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.

Product ID	Description	Lead Time	Unit List Price (USD)
1.0 WS-C4948E	Catalyst 4948E, opt sw, 48-Port 10/100/1000+ 4 SFP+, no p/s	Not Applicable	13,500.0
2.0 CTI-4520-MCU-K9-R	MCU-4520 - REMANUFACTURED	Not Applicable	234.4

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

Remanufactured products are not available in certain countries. Availability will be validated at time of order submission.

Request Reservation

Hardware	Qty on Quote	Qty to Reserve	Availability	Lead Time		
				3 Days	7 Days	23+ Days
<input type="checkbox"/> 1.0 CISCO2911/K9-RF	1	1	26	0	0	26
Ship-To UNITED STATES						

Close

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.

<input checked="" type="checkbox"/> + 1.0 WS-C4948E Catalyst 4948E, opt sw, 48-Port 10/100/1000+ 4 SFP+, no p/s More...	Not Applicable	13,500.00	<input type="button" value="1"/>	13,500.00
VALID Thu 04-Feb-2016 08:55:53 PST				
<input type="button" value="Buy Method"/> Edit Options Select Service Add Note More Actions				
<input type="checkbox"/> + 2.0 CTI-4520-MCU-K9-RF REFRESH CP MCU-4520 - REMANUFACTURED More...	Not Applicable	14.00	<input type="button" value="1"/>	234,444.00
VALID Thu 04-Feb-2016 09:21:15 PST				
<input type="button" value="Copy"/> Delete				

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.

The screenshot shows a list of items with their details, including part numbers, descriptions, and prices. An 'Add Note' button is highlighted with a red box and the number '4'. A callout box also points to this button.

Line Item	Description	Buy Method	Unit Price	Quantity	Total Price	
1.0 WS-C4948E	Catalyst 4948E, opt sw, 48-Port 10/100/1000+ 4 SFP+, no p/s	Select	Not Applicable	14,911.00	1	14,911.00
2.0 CTI-4520-MCU-K9-RF	MCU-4520 - REMANUFACTURED	Select	VALID Thu 04-Feb-2016 09:43:24 PST	234,444.00	1	234,444.00
3.0 ASF-ESG-SVD-BASE	StadiumVision Plan/Build Base	Select		65,029.00	1	65,029.00

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:
 - Click Add Note under the appropriate line item. A text field displays.
 - Click the text field. Enter up to 300 characters.
 - Click **Save**. The text field closes.
 - To change the user note, click Edit Note. The note displays.
 - Edit the user note and click **Save**.
 - 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.

The screenshot shows a list of items with their details, including part numbers, descriptions, and prices. A 'Select Options' button is highlighted with a red box and the number '1'. A callout box also points to this button.

Line Item	Description	Buy Method	Unit Price	Quantity	Total Price	
4.0 CISCO2911/K9 CP	Cisco 2911 w/3 GE, 4 EHWIC, 2 DSP, 1 SM, 256MB CF, 512MB DRAM, IPB	Select	Not Applicable	2,695.00	1	2,695.00

Quote Tab: Items Sub-Tab

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

- 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](#)).

SKU	Qty	Lead Time	Unit List Price (USD)
S29UK9-15501T CP	1	14 days	0.00
S29UK9-15303M CP	1	14 days	0.00
S29UK9-15403M CP	1	14 days	0.00
S29UK9-15503M CP	1	14 days	0.00

Option Selection Page

- Review the product list displaying on the left of the page in the Configuration Summary pane.
- 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.
- 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.
- 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.

The screenshot shows the 'OPTION SELECTION UCSC-C220-M4S' page. On the left, there's a 'Configuration Summary' table with columns for Category, Qty, and Unit List Price (USD). A 'Country Specification' dropdown is also present. On the right, under 'Warnings (6)', it says: 'A minimum of 1 Rail Kit Accessories is required. Please adjust the quantity. (CE200056)', 'A selection of 1 Cisco ONE Option is required. Please adjust the selections. (CE200439)', and 'UCSC-C220-M4S quantity 1 requires a minimum quantity of 1 from Processor (CE100012)'. Below this is the 'Multiple Options Search' section. It includes a 'Processor' dropdown set to 'UCS-C220-M4S > Processor', a 'UnitDisplay' dropdown set to 'Metric' (which is circled in red with number 3), and a 'Power Calculator' dropdown which is also circled in red with number 1. There's a 'Key' dropdown next to the calculator. At the bottom of the search section, there are tabs for 'Idle' and 'Max' power consumption. To the left of the search section, there's a list of processor SKUs: UCS-CPU-E52699D, UCS-CPU-E52698D, UCS-CPU-E52697D, UCS-CPU-E52695D, and UCS-CPU-E52690D, each with its technical details.

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.

The screenshot shows the 'OPTION SELECTION N20-C6508' page. On the left, there's a 'Configuration Summary' section with a 'View Full Summary' link. Below it is a 'Country Specification' dropdown. The main area has a tree view under 'BLADE OPTIONS' with categories like 'Blade', 'CHASSIS OPTIONS', 'Fabric Extender', 'Power', and 'Chassis Expansion'. A red circle labeled '8' is over the 'Power' category. To the right, the 'Option Search' tab is open, showing a search for 'UCSB-B420-M4'. The results table includes columns for SKU, SKU Location, and Qty. A red box highlights the 'Result By: Available Location' link. Another red box highlights the 'Result By: Potential Location' link. At the bottom, there's a 'Subtotal' row and an 'Estimated Lead Time' of '10 days'. A red circle labeled '9' is over the 'Estimated Lead Time'.

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.

! Warnings (3):

- The quantity of Power Cables must be equal to the quantity of Primary Power Supply selected. Please adjust the quantity. (CE200050)

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 CISCO2911/K9

Global Price List - US (USD)

Configuration Summary [View Full Summary](#)

Country Specification [ⓘ](#)
Select Country (Not Required)

Category [ⓘ](#) Qty Unit List Price (USD) [1](#)

DRAM Options [2](#)

Compact Flash Options

USB Options

MODULES [^](#)

Blade Servers

Service Modules (SM, NM, NME, EVM)

Interfaces (EHWIC, HWIC, WIC, VIC, VWIC)

Internal Service Module

PVDM Options

Subtotal 2,695.00
Estimated Lead Time 14 days

Reset Configuration [Cancel](#) [Done](#)

Warnings (3):

- The quantity of Power Cables must be equal to the quantity of Primary Power Supply selected. Please adjust the quantity. (CE200050)
- Have you considered using Cisco ONE <http://www.cisco.com/go/one> for this order? The Cisco ONE equivalent for the current bid is C1 CISCO2911/K9 (CE201920)

Option Search [ⓘ](#)

MEMUSB-1024FT [Search](#)

Option Search Results Filter By ALL Key [v](#)

SKU	Lead Time ⓘ	Unit List Price (USD)
MEMUSB-1024FT	21 days	850.00

Result By: Available Location [ⓘ](#)

SKU	SKU Location	Qty
MEMUSB-1024FT	USB Options > MEMUSB-1024FT	1

Add

Result By: Potential Location [ⓘ](#)

SKU	SKU Hierarchy
-----	---------------

Option Selection Page: Option Search Tab

- 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.

- 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.

- Click the radio button corresponding to the SKU.
- 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:

- 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.

The screenshot shows the 'OPTION SELECTION WS-C4948E-E' page. At the top right, it says 'Global Price List - US (USD)'. In the center, there's a red box containing a warning message: 'Warning (1): WS-C4948E-E quantity 1 requires a minimum quantity of 1 from Power Cable (CE100012)'. Below the warning, there's an 'Option Search' section with a search bar and a dropdown menu for 'Multiple Options Search'. A table titled 'Accessory kit' lists a single item: 'CAB.CON.C4K.RJ45' (Console Cable 6ft with RJ-45-to-RJ-45). The table includes columns for SKU, Qty, Lead Time, and Unit List Price (USD).

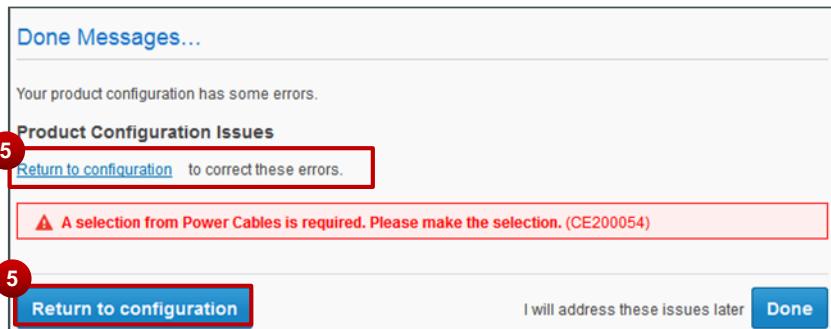
Option Selection Page

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.

The screenshot shows the 'Configuration Summary' pane. At the top right, it says 'View Full Summary'. Below it, there's a 'Country Specification' section with a dropdown menu labeled 'Select Country (Not Required)'. A red box highlights this dropdown menu, and a red circle with the number '3' is placed to its left. A scrollable list of countries is visible below the dropdown, including ALBANIA, ANDORRA, ANGOLA, ARGENTINA, ARMENIA, ARUBA, and AUSTRALIA.

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

Line#	Items SKUs	Description	Estimated Lead Time (days)	Unit List Price	Qty	Extended Price	Included
1.1	UCS-IOM-2204XP	UCS 2204XP I/O Module (4 External, 16 Internal 10Gb Ports)	10	\$5,000.00	1	\$5,000.00	No
1.2	UCSB-PSU-2500DC48	2500W -48V DC Power Supply for UCS 5108	10	\$2,999.00	1	\$2,999.00	No

Option Selection Page: Full Configuration Summary

4.4.6 Using Cisco Feature Navigator

Cisco Commerce > Deals & Quotes

Create Deal >
Quote Tab

Populate Deal >
Select Options

Option Selection
Page

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:

- From the Option Selection page, click [Cisco Feature Navigator](#).

The Cisco Feature Navigator page displays in a new window.

The screenshot shows the Cisco Feature Navigator interface. At the top, there is a navigation bar with links for 'Open a Case', 'Training', 'CCW Support Community', and 'Cisco Feature Navigator'. A red box highlights the 'Cisco Feature Navigator' link. Below the navigation bar, the page title is 'OPTION SELECTION WS-C4948E-E'. On the left, there is a 'Configuration Summary' section with a 'View Full Summary' link. On the right, a 'Warning (1)' message states: 'WS-C4948E-E quantity 1 requires a minimum quantity of 1 from Power Cable (CE100012)'. A red circle with the number '1' is positioned above the warning message.

Option Selection Page: Cisco Feature Navigator

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

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

The screenshot shows the Cisco Feature Navigator page. The top navigation bar includes links for 'Products & Services', 'HOME', 'PRODUCTS & SERVICES', 'TOOL INDEX', and 'Cisco Feature Navigator'. A large central image of a man in a suit is displayed. To the right, there are links for 'Help | Feedback' and 'Related Tools' (MIB Locator, Download Software, Cisco Unified Communications Compatibility Tool). A blue box on the right says 'Extend Security, Voice, & Wireless'. Below the main image, a welcome message reads: 'Welcome to Cisco Feature Navigator. Cisco Feature Navigator allows you to quickly find the right Cisco IOS, IOS XE, IOS XR, NX-OS and CatOS software release for the features you want to run on your network.' Below this, four search options are shown in a circular layout: 'Research Features' (Search by Feature/Technology), 'Research Software' (Search by Software/Platform/ProductCode/Image), 'Compare Two Software Releases' (Compare Images), and 'View End of Life Info for Images' (View EoL for Images). At the bottom, a note states: 'By using this tool, you agree to all of Cisco System's [terms and conditions](#) for this tool.'

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.

	Hardware, Software and Services	Lead Time	Unit List Price (USD)	Qty	Extended List Price (USD)
<input type="checkbox"/>	1.0 WS-C4948E Catalyst 4948E, opt sw, 48-Port 10/100/1000+ 4 SFP+, no p/s More...	Not Applicable	14,911.00	<input type="text" value="1"/> 1	14,911.00

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.

<input type="checkbox"/>	1.0 WS-C4948E Catalyst 4948E, opt sw, 48-Port 10/100/1000+ 4 SFP+, no p/s More...	Not Applicable	14,911.00	1	74,555.00
				5	Split

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

To split a quantity of items across distributors, select or add a distributor and enter the quantity that you want the distributor to fulfill.

Hardware, Software and Services	Buy Method	Qty	Action
WS-C4948E	Select	5	
WS-C4948E	Select	3	

Add 2

Quantity will be updated as:

Cancel **OK**

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.

Set preferences for this quote ▾

Preferences

Select a default Service Preference for this Quote to be applied to each item added.

Allow Cisco to attach appropriate services each time a new item is added to a quote.
 I will add services to items myself.
Note: Cisco will still add mandatory service where appropriate.

Service Program
 SMART NET TOTAL CARE

Advanced Hardware Replacement Level
 8X5X4

Onsite Field Engineer
 YES

Software Application Upgrade
 UPDATES AND UPGRADES

Note: Your changes will be automatically saved

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.

<input type="checkbox"/>	2.0 CTI-4520-MCU-K9-RF <small>REFRESH CP</small>	MCU-4520 - REMANUFACTURED <small>More...</small>	Not Applicable	234,444.00	<input type="button" value="1"/>	234,444.00
<small>VALID Thu 04-Feb-2016 09:21:15 PST</small>						
<input type="checkbox"/>	3.0 CISCO2911/K9 <small>CP</small>	Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,256MB CF,512MB DRAM,IPB <small>More...</small>	Not Applicable	2,695.00	<input type="button" value="1"/>	2,695.00
<small>VALID Thu 04-Feb-2016 10:45:37 PST</small>						

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.

Edit Services/Subscriptions

SERVICE/SUBSCRIPTION SELECTION
CISCO2911/K9

The service preferences from items tab cannot be applied to this configuration. Please use the drop-down lists below to select alternate service preferences. (C0214)

Service Preferences

Changes to these preferences may overwrite previous service selections for this configuration.

Service Program	Advanced Hardware Replacement Level	Onsite Field Engineer	Software Application Upgrade
Select...	Select...	Select...	Select...

Apply

Service

Hardware, Software, and Services	Unit List Price	Quantity	Line Total
CISCO2911/K9 Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,256MB CF,512MB DRAM,IPB	\$ 2,695.00	1	\$ 2,695.00
2 Add Services			
PWR-2911-AC Cisco 2911 AC Power Supply	\$ 0.00	1	\$ 0.00

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

SELECT SERVICES FOR
CISCO2911/K9

Technical Support Services

Filter by Brand

Service	Duration
<input checked="" type="radio"/> SMARTNET SERVICES	<input type="text" value="5"/> Month(s) <input type="text" value="12"/> Month(s) <input type="text" value="12"/> Month(s)
<input type="radio"/> SMARTnet Premium 24x7x4 (SNTP)	<input type="text" value="12"/> Month(s)
<input type="radio"/> SMARTnet Enhanced 8x5x4 (SNTE)	<input type="text" value="12"/> Month(s)
<input type="radio"/> IPS Svc, AR NBD (SU1)	<input type="text" value="12"/> Month(s)
+ NETWORK SUPPORT COMBINED SERVICES	
+ SMART NET TOTAL CARE	
+ UNIFIED COMPUTING ISV L1 + L2 SUPPORT	
+ SOFTWARE SERVICES	

Affected Line Items

Update Clicking Update allows you to preview changes to pricing for all affected line items based on your service or duration choices.

Description	Service	SKU	Unit List Price

Cancel **Done**

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.

Set preferences for this quote ▾

Buy Method: Select More ▾

	Hardware, Software and Services	Lead Time ⓘ	Unit List Price (USD)
<input type="checkbox"/>	1.0 WS-C4948E more ⓘ Catalyst 4948E, opt sw, 48-Port 10/100/1000+ 4 SFP+, no p/s VALID Thu 05-May-2016 13:45:33 PDT	14 days	14,217.0
<input type="checkbox"/>	2.0 CISCO1921DC/K9 more ⓘ C1921 Modular Router DC Power,2GE,2EHWICslots,512MB, IP Base VALID Thu 05-May-2016 13:45:33 PDT	21 days	1,554.0

Discount ID ⓘ

Find Products and Solutions Actions ▾

- Import a Saved Configuration
- View Imported Configurations
- Add Trade In Items
- Edit Services for Multiple Lines** (1) (highlighted with red box and circled with red number 1)
- Compare Versions
- Add Previously Purchased Product
- Rearrange Lines

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.

Deal Quote Review and Submit Order Back to Items

Edit Services for Multiple Lines

Choose service options to apply for the selected line items. Use default preferences

Service Program	Advanced Hardware Replacement Level	Onsite Field Engineer
SMARTNET SERVICES	Select...	Select...
Software Application Upgrade	Duration (Months)	
Select...	12	

Note: Service Options may be applied together or independently. However, 'Service Program' and 'Advanced Hardware Replacement Level' will be applied together.

Apply Services **Remove Services** View: All Items

	Estimated Lead Time	Unit List Price (USD)	Qty	Extended List Price (USD)
<input checked="" type="checkbox"/> Hardware, Software and Services	n/a	14,911.00	5	74,555.00
<input checked="" type="checkbox"/> 1.0 WS-C4948E Catalyst 4948E, opt sw, 48-Port 10/100/1000+ 4 SFP+, no p/s (VALID as of Thu Feb 04 12:43:24 EST 2016)	n/a	234,444.00	1	234,444.00
<input checked="" type="checkbox"/> 2.0 CTI-4520-MCU-K9-RF MCU-4520 - REMANUFACTURED (VALID as of Thu Feb 04 12:21:15 EST 2016)	n/a	3,420.00	1	3,420.00
<input checked="" type="checkbox"/> 3.0 CISCO2911/K9 Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,256MB CF,512MB DRAM,IPB (VALID as of Thu Feb 04 13:54:42 EST 2016)	n/a	3,420.00	1	3,420.00

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

SELECT SERVICES FOR
DS-C9148-48P-K9

! Additional services are applicable to one or more products in the configuration.

Service	Duration		
<input type="radio"/> No Service			
+ Collaborative TS Onsite			
<input checked="" type="radio"/> COLL 24x7x4 OS (CBOP)	12 Month(s) Range: 12 to 24		
+ Collaborative TS INT			
Additional Services			
+ IPS Signature Only (SUSA)	12 Month(s) Range: 12 to 12		
Affected Line Items			
Update Clicking Update allows you to preview changes to pricing for all affected line items based on your service or duration choices.			
Description	Service	SKU	Unit List Price

Cancel Done

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.

Line Item	Description	Quantity	Unit Price	Total Price
1.0	CISCO2911/K9 CP Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,256MB CF,512MB DRAM,IPB More...	2	2,695.00	5,390.00
1.0.1	CON-SNT-2911 SNTC-8X5XNBD Cisco 2911 w/3 GE,4 More... Duration: 12.00 Months Change Duration	2	453.00	906.00
1.1	Duration: Months 12	2	.00	.00
1.2	Range: 12 to 60 Months	2	.00	.00
1.3	Not Applicable	2	.00	.00
	Removable faceplate for SM slot on Cisco 2900,3900,4400 ISR More...			

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.

Line Item	Description	Quantity	Unit Price	Total Price
1.0	CISCO2911/K9 CP Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,256MB CF,512MB DRAM,IPB More...	2	3,148.00	6,296.00

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.

<input type="checkbox"/>	1.0 CISCO2911/K9 CP	Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,256MB CF,512MB DRAM,IPB More...	Not Applicable	2,695.00	<input type="button" value="2"/>	5,390.00	
		VALID Thu 04-Feb-2016 11:04:26 PST				Split	
			Buy Method <input type="button" value="Select"/>	<input type="button" value="Edit Options"/>	<input type="button" value="Select Service"/>	<input type="button" value="Add Note"/>	<input type="button" value="More Actions"/>
<input type="checkbox"/>	2.0 CON-SNT-2911	SNTC-8X5XNBD Cisco 2911 w/3 GE,4 Duration: 12.00 Months	Not Applicable	453.00	<input type="button" value="2"/>	906.00	
			Buy Method <input type="button" value="Select"/>	<input type="button" value="Change Dates/Duration"/>	<input type="button" value="Add Note"/>	<input type="button" value="More Actions"/>	

Quote Tab: Items Sub-Tab –Refreshed

4.7 Renewing Software Subscriptions

Cisco Commerce

Deals & Quotes Header Tab

Create Deal

Quote Tab: Items Sub-Tab

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.

The screenshot shows the 'Quote' tab selected in the navigation bar. Below it, there are tabs for 'Items', 'Discounts & Credits', 'Install Site', and 'Billing'. On the right, there are 'Save' and 'Save and Continue' buttons. A red circle with the number '1' is placed over the 'Add Renewal Subscription' button, which is located in a section titled 'Service Preferences' under 'Federal Government' and 'Imported Quotes'. Below this section is a link to 'Find Products...'.

Quote Tab: Items Sub-Tab

2. Select the subscriptions to add.

The screenshot shows the Cisco Commerce Subscription interface. The top navigation bar includes links for Catalog, Estimates & Configurations, Deals & Quotes, Orders, Service Contracts, Subscriptions (which is highlighted in blue), and Software. On the left, there's a sidebar with 'Bill To Customer ID' search, Advanced Search, and tabs for Software Subscriptions and Subscriptions. The main area displays 'Software Subscriptions' with a summary of Active and Signed (569) and Overdue (48) items. Below this is a chart for 'Upcoming Software Subscriptions' showing counts for 1-7 Days (8), 8-15 days (1), and 16-30 days (9). A large table lists 617 results, filtered by All. The table columns include Software Subscriptions, End Customer, Offer Type, Status, Start Date, and End Date. The first row has a checked checkbox (highlighted with a red box and '2').

Software Subscriptions	End Customer	Offer Type	Status	Start Date	End Date
<input checked="" type="checkbox"/> 1.0 ESA-AS-LIC=	Company ABC (154955086)	ESAS	ACTIVE	1 Oct 2010	30 Sep
<input type="checkbox"/> 1.0 ESA-OF-LIC=	Company ABC (154955086)	ESOF	ACTIVE	1 Oct 2010	30 Sep

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.

The screenshot shows the 'Change Services/Subscriptions' page. At the top, it says 'SERVICE/SUBSCRIPTION SELECTION' and lists 'ESA-AS-LIC=' with a note: 'Services preferences not available. (C0213)' and a 'Service Preferences' link. Below this is a table for 'Hardware, Software, and Services' with columns for Unit List Price, Quantity, Start/End Date, and Line Total. It shows an item for 'ESA-AS-LIC=' (100 units at \$0.00) and 'ESA-AS-3Y-S1' (100 units at \$27.78, totaling \$2,778.00). At the bottom are buttons for 'Edit Subscriptions', 'Remove All Services', 'Remove All Additional Services', 'Remove All Subscriptions', and a link to 'Product Price List: Global Price List - US'.

Hardware, Software, and Services	Unit List Price	Quantity	Start/End Date	Line Total
ESA-AS-LIC=	\$ 0.00	100		\$ 0.00
ESA-AS-3Y-S1	\$27.78	100		\$ 2,778.00

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

SELECT SUBSCRIPTIONS FOR
ESA-AS-LIC=

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

Available Subscription SKUs

Hardware, Software, Services and Subscriptions	Start Date	End Date	Duration	Unit List Price
<input checked="" type="radio"/> ESA ANTISPAM LIC Email Security Anti-Spam 1YR Lic Key, 100-199 Users			12 Month(s)	\$ 12.34
<input checked="" type="radio"/> ESA-AS-1Y-S1 Email Security Anti-Spam 1YR Lic Key, 100-199 Users	Start Date <input type="text" value="12/03/2014"/>	End Date <input type="text" value="12/02/2017"/>	36.00 Month(s)	\$ 27.78
<input checked="" type="radio"/> ESA-AS-5Y-S1 Email Security Anti-Spam 5YR Lic Key, 100-199 Users	<input checked="" type="checkbox"/> I want to provide my own Start Date	<input checked="" type="checkbox"/> I want to provide my own End Date	60 Month(s)	\$ 46.29

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.

Set preferences for this quote ▾

Discount ID

Search by SKU, Description and Product Family Qty

Find Products and Solutions | Actions ▾

Import a Saved Configuration
View Imported Configurations
Add Trade In Items 2
Edit Services for Multiple Lines
Compare Versions
Add Previously Purchased Product
Rearrange Lines

Buy Method	Hardware, Software and Services	Lead Time ⓘ	Unit List Price (USD)
<input type="checkbox"/>	1.0 WS-C4948E more ⓘ Catalyst 4948E, opt sw, 48-Port 10/100/1000+ 4 SFP+, no p/s VALID Thu 05-May-2016 13:45:33 PDT	14 days	14,217.0
<input type="checkbox"/>	2.0 CISCO1921DC/K9 more ⓘ C1921 Modular Router DC Power,2GE,2EHWICslots,512MB, IP Base VALID Thu 05-May-2016 13:45:33 PDT	21 days	1,554.0

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.

Import Trade In BOM | Add Cisco Products... | Add Competitor Products...

Remove Selected

Hardware, Software and Services	Trade-in Type	Qty	Trade In Unit Credit
No records			

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

Search Cisco Trade-in products

Product Family	Part Number	Quantity
<input type="text"/>	<input type="text"/>	<input type="text"/>

Save

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

Search Type Upload Trade in BOM

10 Product Family Product Category - Credit Criteria/Port Product Description Product Number

Manufacturer : Product Category :

Search Results

Part Number	Part Description	Quantity

Save

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.

Hardware, Software, Services and Subscriptions		Unit List Price (USD)	Qty	Extended List Price (USD)	Total Discounts %	Total Discounts Amount (USD)	Credits (USD)	Extended Net Price (USD)
+ 1.0	CISCO2911-V/K9 Cisco 2911 Voice Bundle, PVDM3-16, UC License PAK, FL-CUBE10	3,963.00	1	3,963.00	34.60	1,371.20	--	2,591.80

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.

	Hardware, Software, Services and Subscriptions	Unit List Price (USD)	Qty	Extended List Price (USD)	Total Discounts %	Amount (USD)	Credits (USD)	Extended Net Price (USD)
1.0	UCSB-EZ-UC-B200M3 UCS on UCSB 2F148,1xCH-4xB200M3w/2x2680.96GB,noHDD,1xVIC1240	62,422.88	1	142,859.51	64.19	91,706.14	--	51,153.37
US OIP Q1 BR-USOI-160812-114019 4.00% 0.00								
Compute Category - Certification - Gold - USD 61.00% 0.00								
Add Subtotal								
2.0	UCSC-C220-M4S UCS C220 M4 SFF w/o CPU, mem, HD, PCIe, PSU, rail kit	22,175.00	1	22,175.00	65.85	14,602.25	--	7,572.75
Configuration based Discount PP-Ninj-161230-111061								
Compute Category - Certification - Gold - USD								
US OIP Q1 BR-USOI-160812-114019								
Core Category - Certification - Gold - USD								
2.0.1	CON-SCUN-C220M4S SC UCS ADV 8X5NBD UCS C220 M4 SFF w/o CPU, mem, HD	331.00	1	455.13	10.00	45.51	--	
Duration: 12 Months								
2.1	UCS-CPU-E52699D 2.30 GHz E5-2699 v3/145W 18C/45MB Cache/DDR4 2133MHz							
2.2	UCS-ML-1X324RU-A 32GB DDR4-2133-MHz LRDIMM/PC4-17000/quad rank/x4/1.2v		1					

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

View By Discount Details Filter By All Items							
	Hardware, Software, Services and Subscriptions	Unit List Price (USD)	Qty	Extended List Price (USD)	Total Discounts %	Credits (USD)	Extended Net Price (USD)
1.0	UCS-B-EZ-UC-B200M3 UCS on UCSB 2FI48,1xCH-4xB200M3w/2x2680,96GB,noHDD,1xVIC1240	62,422.88	1	142,859.51	64.19	91,706.14	-- 51,153.37
	US OIP Q1 BR-USOI-160812-114019	4.00%		0.00			
	Compute Category - Certification - Gold - USD	61.00%		0.00			
	Add Subtotal						
2.0	UCS-C220-M4S UCS C220 M4 SFF w/o CPU, mem, HD, PCIe, PSU, rail kit	3,365.00	1	3,365.00	65.00	2,187.25	-- 1,177.75
	US OIP Q1 BR-USOI-160812-114019	4.00%		134.60			
	Compute Category - Certification - Gold - USD	61.00%		2052.65			
2.0.1	CON-SCUN-C220M4S SC UCS ADV 8X5XNBD UCS C220 M4 SFF w/o CPU, mem, HD	331.00	1	455.13	10.00	45.51	-- 409.62
	Duration: 12 Months						
2.1	UCS-CPU-E52689D 2.30 GHz E5-2699 v3/145W 18C/45MB Cache/DDR4 2133MHz	13,686.00	1	13,686.00	65.00	8,895.90	-- 4,790.10
	US OIP Q1 BR-USOI-160812-114019	4.00%		547.44			
	Compute Category - Certification - Gold - USD	61.00%		8348.46			
2.2	UCS-ML-1X324RU-A 32GB DDR4-2133-MHz RDIMM/PC4-17000/quad rank/x4/1.2v	1,450.00	1	1,450.00	78.00	1,131.00	-- 319.00

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

Export Records

Please Select the output of your quote.

Content Type:
 Quote Items

File Type

Orientation:

Language:

Static Text:

Bill of Materials:
 Items with (please select all that apply)
 Line Level Discounts
 Quote Discounts Summary
 Financial Summary
 Rollup Price for Eligible Items

Financial Summary Only

Contact Details:
 Include Account Manager Details
 Include Channel Account Manager Details
 Partner Information

4.9.2 Formatting a Quote

Use the option Rearrange Lines to rearrange the quote lines.

To format a quote, complete the following steps:

- 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

Item ID	Description	Buy Method	Unit List Price	Qty	Extended List Price	Extended Net Price
1.0	WS-C4948E Catalyst 4948E opt.sw, 48-Port 10/100/1000+ 4 SFP+, no p/s		13,500.00	1	13,500.00	5,940.00
2.0	CISCO2911/K9 Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,256MB CF,512MB DRAM,IPB		3,148.00	1	3,148.00	1,344.35

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.

The screenshot shows the 'Financial and Promotional Summary' tab selected. The interface includes tabs for Deal, Quote, Review and Submit, and Order. Below these are sub-tabs: Items, Discounts and Credits, Install/Service Location, and Billing. A 'Save and Continue >' button is visible. A green message bar at the top says 'Your quote has been priced successfully.' The main content area displays a table of financial details:

	Total List Price (USD)	Discount	Extended Net Price (USD)
Products	3,595.00	32.00 %	2,444.60
Services	368.00	60.00 %	147.20
Special Items List Total	0.00	-- %	--
Discounts and Credits			1,371.20
Discount		(34.60%)	1,371.20
Special Items Discounts		--%	--
Credits			--
Adjustments			--
Deal Total	3,963.00	(34.60%)	2,591.80

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.

The screenshot shows the 'Deal' tab of the Cisco Deals and Quotes application. At the top, there are tabs for 'Deal', 'Quote', 'Review and Submit', and 'Order'. Below these are sub-tabs: 'Who's Involved', 'About the Deal', 'Incentives', and 'Questionnaire'. On the right, there are two large buttons: 'Save' and 'Save and Continue >'. A note above the buttons states: 'Incentives are linked to this field * Required Field'. The main form area contains several input fields: 'Deal Description' (text area), 'Price List' (dropdown set to 'Global Price List US Availability'), 'Expected Closing Date' (calendar icon), 'Expected Cisco Hardware and Software List Amount' (\$ 0.00), 'Expected Cisco Service List Amount' (\$ 0.00), and 'Total Expected Amount' (\$ 0.00). To the left, there are sections for 'Intended Use' (dropdown set to 'Internal Business Use'), 'Deal Category' (dropdown set to 'Please Select'), 'Deal Source' (dropdown set to 'Get Refreshed'), and 'Probability of Closing' (dropdown set to '25% - Low'). The 'Deal Type' dropdown is highlighted with a red box and the number '3'.

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 regenerated. 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.

The screenshot shows the 'Lease Payments Calculator' dialog box. It includes sections for 'Add Estimated Discount/Net Price for End Customer' (with tables for Cisco Hardware and Software, Cisco Services, and Non Cisco Amount), 'Financing Options' (with a button to 'Calculate to view Financing Options'), 'Capital Promotions Applied', 'Terms & Conditions', and 'View More About Cisco Capital or Contact Information'. Buttons for 'Save' (6), 'PDF' (9), and 'Reset' are at the bottom. Step numbers 1 through 9 are overlaid on specific fields and buttons: 1 on the first table header, 2 on the Non Cisco Amount field, 3 on the Billing Frequency dropdown, 4 on the Financial Product dropdown, 5 on the 'Calculate' button, 6 on the 'Save' button, 7 on the 'View More About Cisco Capital or Contact Information' link, and 8 on the 'Please contact me regarding end-customer financing' checkbox.

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.

Deal Quote Review and Submit Order

Items Discounts and Credits Install/Service Location Billing

1 Your quote has been priced successfully.

2 Promotions expiring soon are part of discount applied on your BOM. Click here to Opt out of promotions and get next best discount.

Financial and Promotional Summary

	Hardware, Software, Services and Subscriptions	Unit List Price (USD)	Qty	Extended List Price (USD)	Total Discounts %	Credits (USD)	Extended Net Price (USD)
3	CISCO7606-S= Cisco 7606-S Chassis	14,500.00	100	1,450,000.00	42.00	609,000.00	-- 841,000.00
				Q1FY17 Test Promo 2 PP-Q1FY-160820-113362	0.00%	0.00	
				Core Category - Certification - Gold - USD	42.00%	252000.00	
							Add Subtotal

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.

Financial and Promotional Summary

2 Promotional Summary

3 Quoting QA PP 1

4 Opt Out

Name	Code	End Date	Type
Quoting QA PP 1	PP-Quot-160731-111462	21-Aug-2016	Short Term
Q1FY17 Test Promo 2	PP-Q1FY-160820-113362	20-Aug-2016	Short Term

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.

5 Quoting QA PP 2
Q1FY17 Test Promo 2

6 Opt In

Name	Code	End Date	Type
Quoting QA PP 1	PP-Quot-160731-111462	21-Aug-2016	Short Term
Quoting QA PP 2	PP-Quot-160731-111467	21-Aug-2016	Short Term
Q1FY17 Test Promo 2	PP-Q1FY-160820-113362	20-Aug-2016	Short Term

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:

- To set the original install site as the install site for the entire quote, click the **Apply Default to All Items** button.
- 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

Customer Company Name *

Address 1

Country *

Address 2

United States

Address 3

Address 4

State/Province *

Select

City ⓘ Zip/Postal Code

Note: If you cannot find the customer you are looking for following a search, please contact your Cisco account team for correct customer details. AS A LAST OPTION ONLY, you will be able to create a new end customer, however this will delay the deal approval process.

Reset **Search**

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		Edit Service Location	Apply Default to All Items
<input checked="" type="checkbox"/> Hardware, Software and Services	Install Site/Service Location Country *		
<input checked="" type="checkbox"/> 1.0 CISCO2911/K9 Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,256MB CF,512MB DRAM,IPS	UNITED STATES	+ Add a Full Install Site	
<input checked="" type="checkbox"/> 2.0 WS-C4948E Catalyst 4948E, opt sw, 48-Port 10/100/1000+ 4 SFP+, no p/s	UNITED STATES	+ Add a Full Install Site	

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](#).

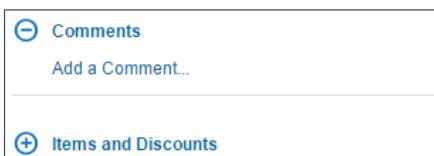
Click (+) to expand and review each section on the Review and Submit tab.

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.

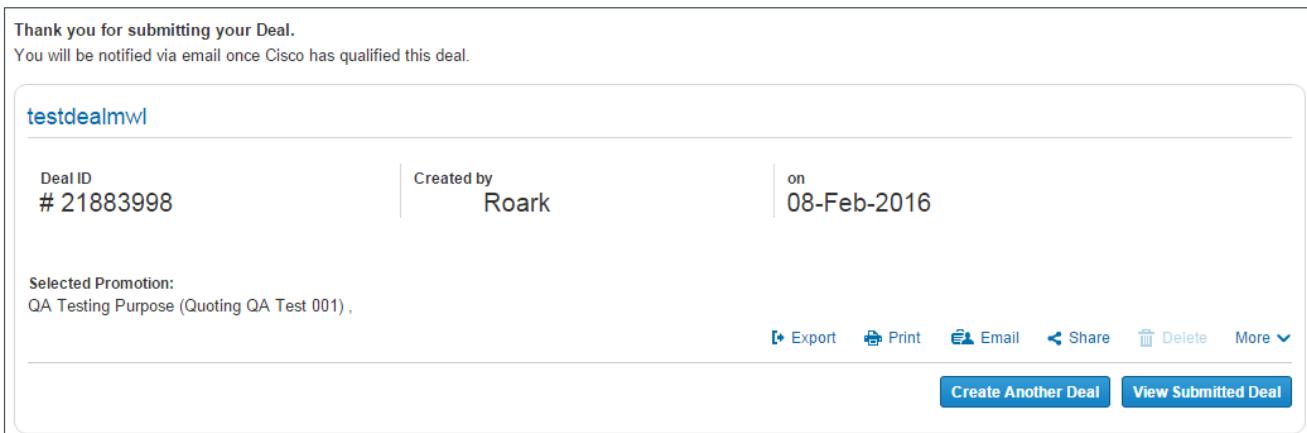
If the chosen incentive requires qualification, complete the following steps:

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.

Quote Summary		All prices shown in USD	Deal Summary	
Configured Hardware and Software List Total		13,500.00	Expected Cisco Hardware and Software List Amount	1,000,000.00
Configured Service List Total		.00	Expected Cisco Service List Amount	500,000.00
Special Items List Total:		.00	Deal Total	1,500,000.00
Discounts	(-)	--	User currency dictated by promotion rules and country policy	
Product Total Discount	(-)	--		
Service Total Discount	(-)	--		
Credits		--		
Adjustments		--		
Quote Total		--		
View Deal Consumption Total				

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](#).

The screenshot shows a form with the following fields:

- Quote Total:** A text input field.
- View Deal Consumption Total:** A link.
- Try and Buy:** A section with a checkbox labeled "Try and Buy".
- TAB Help:** A link next to the "Try and Buy" section.
- Manage Deviations:** A link.

Review and Submit Tab: Try and Buy Section

The dialog box contains the following fields:

- Request Try and Buy:** Title bar.
- Please request Try and Buy below:** A section with a checkbox labeled "Try and Buy".
- Choose a Sub-program/Sub-Track:** A dropdown menu labeled "Choose a Sub-program/Sub-Track".
- Final Trial Period for the Deal:** A section with a note: "Please ensure that you have addressed the following before continuing with Try and Buy:" followed by a numbered list of 5 items.
- Cancel** and **Save** buttons at the bottom.

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.

The section includes:

- Try and Buy:** A section with a checkbox labeled "Try and Buy".
- TAB Help:** A link.
- Sub-Program/Sub-Track:** A dropdown menu showing "Regular Try and Buy".
- Final Trial Period for the Deal:** A dropdown menu showing "90 Days".

Review and Submit Tab: TAB Section – TAB Details

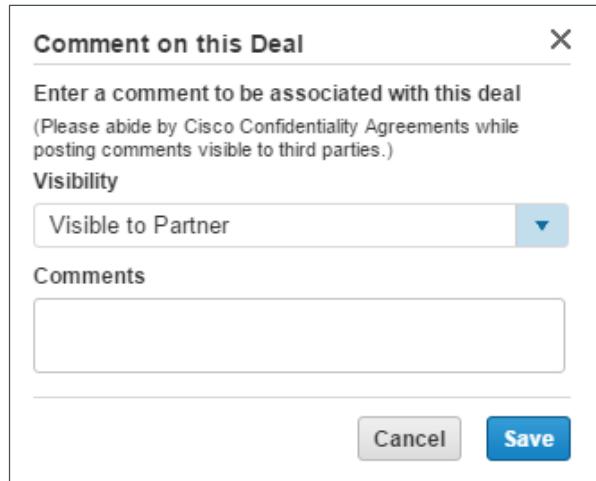
5.2.4 Managing Deviations Section

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**.



The dialog box has a title bar "Comment on this Deal" with a close button "X". Inside, there's a text area: "Enter a comment to be associated with this deal (Please abide by Cisco Confidentiality Agreements while posting comments visible to third parties.)". Below it is a "Visibility" dropdown set to "Visible to Partner". A large text input field for "Comments" is present. At the bottom are "Cancel" and "Save" buttons.

Comment on this Deal Dialog Box

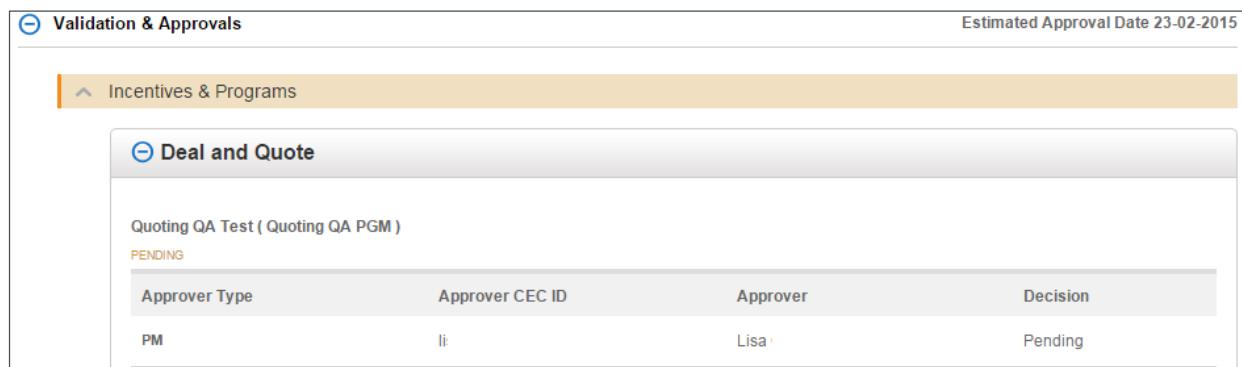
Click **Submit Quote for Approval**. A confirmation page displays.

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.



The screenshot shows the "Validation & Approvals" section under the "Incentives & Programs" tab. It displays a table for a promotion named "Quoting QA Test (Quoting QA PGM)". The table has columns: Approver Type, Approver CEC ID, Approver, and Decision. One row shows "PM" in Approver Type, "li" in Approver CEC ID, "Lisa" in Approver, and "Pending" in Decision. The estimated approval date is listed as 23-02-2015.

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

* Required Field

! If your deal involves an End Customer buying in multiple countries, or being fulfilled by multiple Partner types (Self, Subsidiary, Agent or Disti as Agent) in a country, check the applicable box below and refer to this [Global Deal Training Guide](#)

If you are not creating a Global Deal, simply click the "Create Deal" button to continue. (Note: Not applicable for Outsourcing deals).

Deal Name *

Check this box to create and register a Global Deal
 Create a Local Component of your Global Deal

Note: Global Deal needs to be created and Qualified /Approved prior to creating Local Deals.

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 *

Enter the list of end-customer countries of procurement (one entry per Fulfillment Partner type per country). For each entry, enter the expected revenue amount and the type of Fulfillment Partner (Self if you are Host Partner fulfilling orders, Subsidiary if you are Host Partner with a legal presence in the fulfilling country fulfilling orders, Agent if another partner in the fulfilling country will fulfill orders, or Disti As Agent if a Distributor acting as an Agent in the fulfilling country will fulfill orders).

<input type="checkbox"/> Country *	Expected Cisco Hardware & Software List Amount (USD) *	Expected Cisco Service List Amount (USD)	Total Expected Amount (USD)	Fulfilling Partner *
<input type="checkbox"/> UNITED STATES	50000	25000	75000	Self ▾
<input type="checkbox"/> AUSTRALIA	25000	10000	35000	Agent ▾
<input type="checkbox"/> JAPAN	10000	5000	15000	Subsidiary ▾

Buttons: Remove | Add | Save | Save and Continue >

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.

Add Items

Select All Countries
 Cambodia

Start adding items by selecting the countries

Added Items

<input type="checkbox"/>	Product Families, Services Levels, Technology Group	Country	Extended List Price	Discount (%) <i>i</i>	Extended Net Price	Actions
<input type="checkbox"/>	Select to Edit	Select to Edit				
<input checked="" type="checkbox"/>	1.0 Cisco 10000 Series of Edge Services Routers (ESR)	Cambodia	--	--	--	
<input type="button" value="Remove Selected"/> <input type="button" value="Filter Items"/>						

+ SKUs

<input type="checkbox"/>	Hardware, Software and Services	Country	Unit List Price	Qty	Extended List Price	Discount (%) <i>i</i>	Extended Net Price	Actions
--------------------------	---------------------------------	---------	-----------------	-----	---------------------	-----------------------	--------------------	---------

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 countries. 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-qpn@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 a Deal

* Required Field

If your deal involves an End Customer buying in multiple countries, or being fulfilled by multiple Partner types (Self, Subsidiary, Agent or Disti as Agent) in a country, check the applicable box below and refer to this [Global Deal Training Guide](#)

If you are not creating a Global Deal, simply click the "Create Deal" button to continue. (Note: Not applicable for Outsourcing deals).

Deal Name *

Check this box to create and register a Global Deal
 Create a Local Component of your Global Deal

Note: Global Deal needs to be created and Qualified /Approved prior to creating Local Deals.

Global Deals

Deal Id	Global Deal Name	End Customer	Total Deal Amount	Approved Incentive Reward Name
<input type="radio"/> 21881147	Q3FY16_Accuprice_GPN01		100	
<input type="radio"/> 21877102	GPN SIT DEAL PRICING		868612107	
<input checked="" type="radio"/> 20402365	GPN Test		107000	
<input type="radio"/> 20401341	Test_Global_deal		100	

Cisco Channel Account Manager (CAM)* Cisco Account Manager (AM)

Create Deal Page

- 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.

- Under the Fulfilling Partner section:

If this local deal is 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.

Select a Fulfilling Partner

Search By Cisco.com ID Cisco.com User ID <input type="text"/>	Search By Partner Company Name Partner Company <input type="text"/>
<input type="button" value="Search a Fulfilling Partner"/>	<input type="button" value="Search a Fulfilling Partner"/>

Recently Used Fulfilling Partner

Cisco.com ID	First Name	Last Name	Company Name	Country
Select	Maria		SYSTEMS, INC	USA

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-qpn@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

Quote Name *

Cisco Channel Account Manager (CAM) *

Select CAM TO BE ASSIGNED BY CISCO

Buying on behalf of

First Name Last Name
Title
Phone Number
Email Address
Company Website

CONTACT & ADDRESSES

End Customer *

+ Select an End Customer
English | Chinese | Japanese | Korean
NEW Faster Search (English Only)

Partner * INC

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 Channel Account Manager (CAM) *	Cisco Account Manager (AM)
Select CAM	(To be assigned by Cisco.)
Find your CAM with the CAM Locator.	

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 * ⓘ
This address will be default for new items
 OR

Service Location * ⓘ
This address will be default for new items
 OR

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.

The screenshot shows a quote creation page. At the top, there are buttons for Export, Print, Email, Share, Delete, and More. Below that, a row of fields includes 'QUOTE NAME' (mwl), 'DEAL ID' (22586889), 'QUOTE NUMBER' (4712777710), 'QUOTE STATUS' (NOT SUBMITTED), and 'EXPIRY DATE' (N/A). A navigation bar below has tabs for Deal, Quote, Review and Submit, and Order. Sub-tabs include Items, Discounts and Credits, Install/Service Location, and Billing. Buttons for Save and Save and Continue are present. A section for 'Set preferences for this quote' is shown, along with a search bar for SKU, Description, and Product Family. A 'Discount ID' input field is highlighted with a red border. At the bottom right are Find Products and Solutions and Actions buttons.

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.

Intended Use		Partner Name	Price List
Internal Business Use		SYSTEMS, INC	Global Price List US Availability
Deal Category		Billing Address	
Not Known		Billing ID: 401 Operating Unit: CISCO US OPERATING UNIT Address: ENGLEWOOD, CO, US	End Customer Address INC EL SEGUNDO, CA, 90245, US

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



QUOTE NAME: testquotemwl

DEAL ID: 21884311 QUOTE NUMBER: 4712066378 QUOTE STATUS: Not Submitted EXPIRY DATE: N/A

Global Price List US Availability (USD)

Deal Quote Review and Submit Order

Submit Quote for Approval

Who's Involved About the Deal Quote Trade In Items Install Site Billing

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.

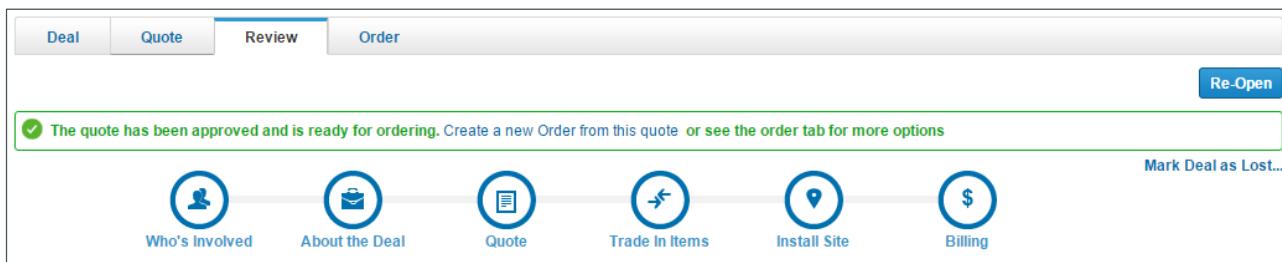
- Manage Deviations section
- Comments section



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.

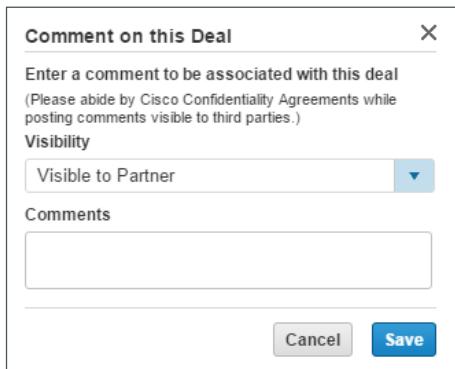
1. Expand the comments section.
2. Click Add a Comment. The Comment on this Deal dialog box displays.

(–) **Comments**

Add a Comment...

(+) **Items and Discounts**

Comment Section



The dialog box has a title bar "Comment on this Deal" with a close button "X". Inside, there is a text area with placeholder text: "Enter a comment to be associated with this deal (Please abide by Cisco Confidentiality Agreements while posting comments visible to third parties.)". Below this is a "Visibility" dropdown menu set to "Visible to Partner". There is also a "Comments" text area. At the bottom are two buttons: "Cancel" and "Save".

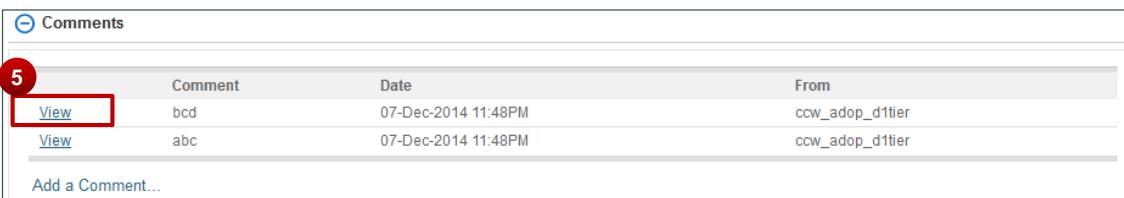
Comment on this Deal Dialog Box

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.

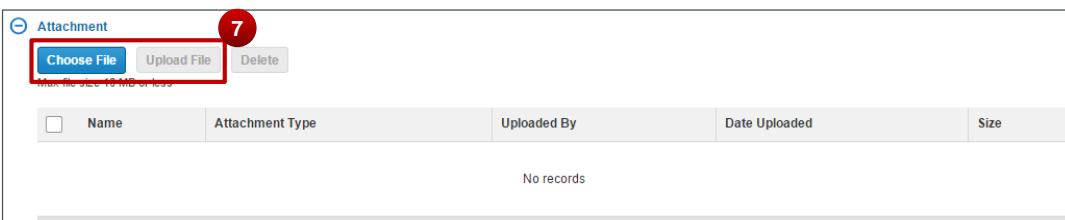


The table shows a list of comments. The first row has a red box around the "View" link. A red circle with the number 5 is placed over this row. The second row has a red box around the "View" link. A red circle with the number 6 is placed over this row. The table has columns for Comment, Date, and From.

Comments			
Comment	Date	From	
bcd	07-Dec-2014 11:48PM	ccw_adop_d1tier	
abc	07-Dec-2014 11:48PM	ccw_adop_d1tier	
Add a Comment...			

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**.



The form has a title "Attachment" with a red circle containing the number 7 over the "Choose File" button. Below the button are "Upload File" and "Delete" buttons. The main area shows a table with columns for Name, Attachment Type, Uploaded By, Date Uploaded, and Size. A note "No records" is displayed at the bottom.

Name	Attachment Type	Uploaded By	Date Uploaded	Size
No records				

Add Attachments

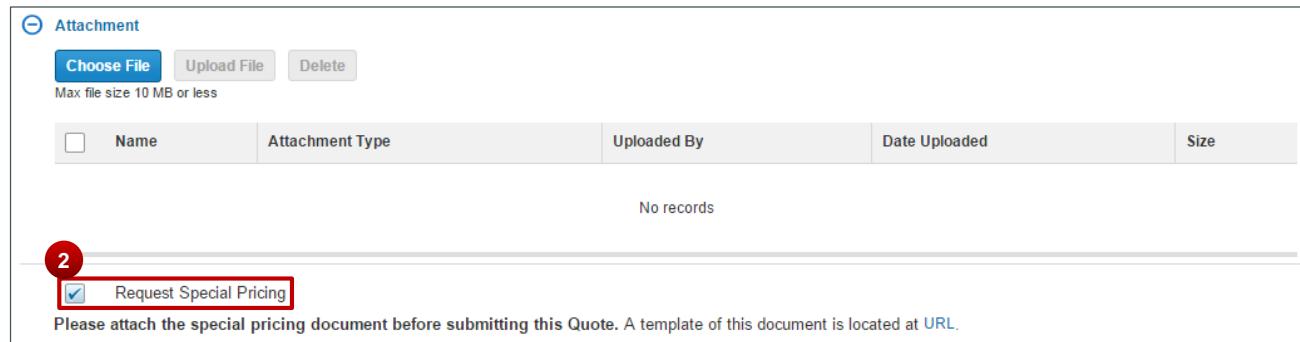
8. If there are multiple attachments, they will display in rows. Click View to view them.
9. Alternatively, check the checkbox for each attachment and click the delete icon to delete them.

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.



The screenshot shows a user interface for managing attachments. At the top, there are buttons for 'Choose File', 'Upload File', and 'Delete'. Below these, a note says 'Max file size 10 MB or less'. A table follows with columns for 'Name', 'Attachment Type', 'Uploaded By', 'Date Uploaded', and 'Size'. A message 'No records' is displayed below the table. At the bottom of the form, there is a red box highlighting a checkbox labeled 'Request Special Pricing'. To the left of this box is a circled number '2'. Below the checkbox, a note says 'Please attach the special pricing document before submitting this Quote. A template of this document is located at [URL](#)'.

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.

	Quote ID	Last Modified
5922	4712774404	03 May 2016
5916	4712774394	03 May 2016
5908	4712774381	03 May 2016
5918	4712774397	03 May 2016
1827	4712774340	03 May 2016

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.

	Report Name	Status	Requested On	Completed On
<input type="checkbox"/>	cisco_commerce_workspace_report-05-may-2016 23-16-36	Ready	05-may-2016 / 23:16	05-may-2016 / 23:30
<input type="checkbox"/>	cisco_commerce_workspace_report-05-may-2016 07-10-48	Ready	05-may-2016 / 07:10	05-may-2016 / 07:20
<input type="checkbox"/>	cisco_commerce_workspace_report-04-may-2016 07-04-39	Ready	04-may-2016 / 07:04	04-may-2016 / 07:17
<input type="checkbox"/>	cisco_commerce_workspace_report-29-apr-2016 13-52-45	Ready	29-apr-2016 / 13:52	29-apr-2016 / 14:09
<input type="checkbox"/>	cisco_commerce_workspace_report-26-apr-2016 03-28-22	Ready	26-apr-2016 / 03:28	26-apr-2016 / 03:28
<input type="checkbox"/>	cisco_commerce_workspace_report-26-apr-2016 02-48-04	Ready	26-apr-2016 / 02:48	26-apr-2016 / 02:48
<input type="checkbox"/>	cisco_commerce_workspace_report-15-apr-2016 05-13-36	Failed	15-apr-2016 / 05:13	15-apr-2016 / 05:13
<input type="checkbox"/>	cisco_commerce_workspace_report-08-apr-2016 09-28-05	Ready	08-apr-2016 / 09:28	08-apr-2016 / 09:29

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

Deal ID	Quote ID	Deal Name	Discount Type	Deal Status
22586906	4712777739	TD	Standard	NOT SUBMITTED
22586895	4712777717	Test Deal	Standard	NOT SUBMITTED
22586877	4712777697	Create Influencer Deal	Standard	NOT SUBMITTED
22584524	4712772194	NR test1 TC62414: Ap...	Program	MORE INFORMATION REQUESTED

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

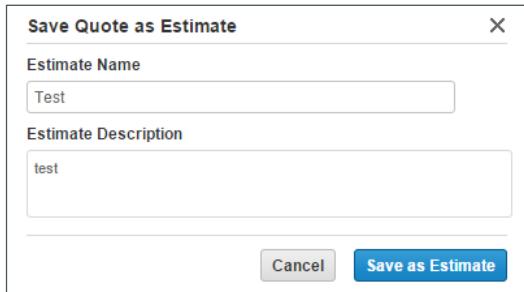
When you create and configure a deal or a quote, the configuration set can be named and saved to be reused. The system will save the configuration set as an estimate and you will receive an estimate ID.



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.



The dialog box is titled "Save Quote as Estimate". It contains two input fields: "Estimate Name" with the value "Test" and "Estimate Description" with the value "test". At the bottom are two buttons: "Cancel" and "Save as Estimate".

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](#)).